Texas License Connection

Point of Sale Licensing Agent

Training Manual

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Unit I

Introduction

Lesson 1

Course Objectives and Content

Training Objectives

This course shows you how to use your point of sale terminal to sell licenses and complete other terminal-related activities for the Texas License Connection (TLC) system.

After finishing this training you should be able to perform the following licensing and terminal-related tasks.

Licensing

- Log on to the terminal
- Search for customers in the TLC system
- Add new customers to the TLC system
- Issue licenses
- Void and replace licenses
- Print the customer's license document
- Print the dealer receipt

Terminal-Related

- Log off
- Generate and print end shift reports
- Change your password

- Read and print Texas Parks and Wildlife (TPW) messages
- Use the Help feature

Management-Related

- Activate your terminal the first time
- Authorize new terminal users
- Generate and print sales and administrative reports
- Manage terminal supplies
- Configure terminal settings
- Process electronic mail

Training Overview

This course is divided into the following units:

Unit	Title	Description
Unit 1	Introduction	Introduces: • Training objectives and course overview • Navigation of the Hypercom unit display • Use of the instructor-led demonstrations and practice exercises
Unit II	Point of Sale Terminal	Describes: • The components of the point of sale terminal and their use • How to use the point of sale terminal when your connection is interrupted
Unit III	Logging On	Explains how to: • Log on • Select your task from the MAIN menu

Unit	Title	Description

Unit IV	Selling Licenses	Describes the sequence of steps to:
		• Gather customer information by:
		    • Searching for a customer in the database; or
		    • Adding a customer to the database
		• Select licenses
		• Print the customer's license document
		• Print the dealer receipt

Unit V	Other Licensing Activities	Explains how to: • Void a customer's license • Replace a lost or damaged license • Use other license-related features
Unit VI	Other Terminal Activities	Explains how to: • Change your password • Log off • Use on-line help • Generate and print an End Shift report • Access and print TPW electronic messages
Unit VII	Other Terminal Activities	Explains how to: • Activate your terminal to begin selling licenses • Authorize new users for the terminal • Generate and print financial and administrative reports • Configure terminal settings • Order terminal supplies • Process TPW electronic messages

Additional Help

Additional support for using your point of sale terminal is available from these following sources.

Point of Sale Terminal

On-line Help	You can get help directly from the point of sale terminal.

Documentation

User Guide	Refer to the User Guide whenever you have a question about a specific task.
Quick Reference Card	For quick reference to common functions and tasks and to select licenses for purchase refer to the quick reference card.

Video

Training Video	The training video: • Introduces the TLC system • Provides detailed, step-by-step instructions on performing licensing, terminal, and management tasks • Explains how to connect the terminal components together, and install the license media and printer ribbon for the license printer

Help Desk

WorldCom Help Desk	The WorldCom Help Desk is staffed seven days a week between the hours of 6:00 a.m. and 9:00 p.m. CST. The toll-free telephone number is: **(866) 852-8793**. Call the Help Desk if you cannot resolve software-related questions through the other help resources provided with your terminal The staff can also help you troubleshoot problems with your equipment and arrange for equipment to be exchanged if necessary by submitting an exchange request. If you cannot complete a license sale due to equipment problems the Help Desk can assist in completing the sale for you and can continue completing sales on your behalf, over the phone, until your equipment is replaced. The Help Desk will submit the necessary equipment exchange request for you. Completing sales on your behalf is not available, however, if: • Your terminal has been locked out for administrative reasons; or • You cannot connect to the TLC system due to an interruption in your telephone connection When your phone connection is interrupted you will have to continue your licensing transactions off-line.

Instructor-Led and Practice Exercises

Each lesson begins with a demonstration, led by the instructor, showing you how to perform the tasks introduced in the lesson.

Instructor-Led Demonstration

An instructor-led demonstration begins with the following introduction:

To Demonstrate -

...followed by the specific task the instructor will introduce.

After the task is demonstrated important information about the topic is presented.

Practice Exercises

At the end of most of the lessons you will have an opportunity to practice what has been taught.

Practice exercises begin with the following introduction:

Practice Exercise

This is followed by a list of the specific tasks included in the exercise and detailed instructions on how to complete the exercise.

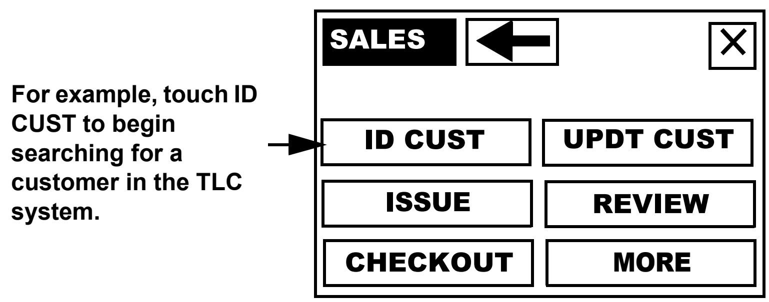
At the end of each practice exercise the following appears:

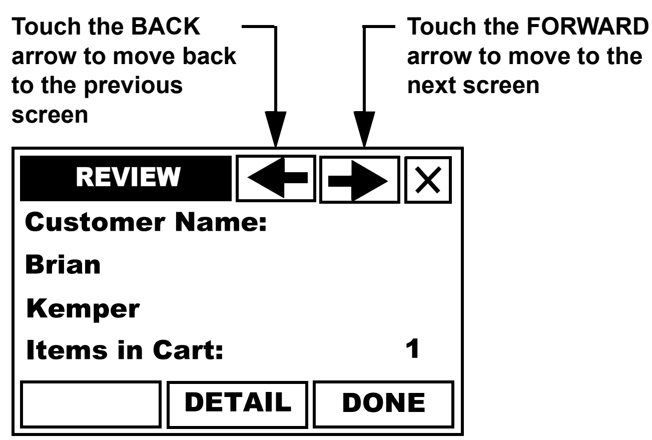
Stop Here

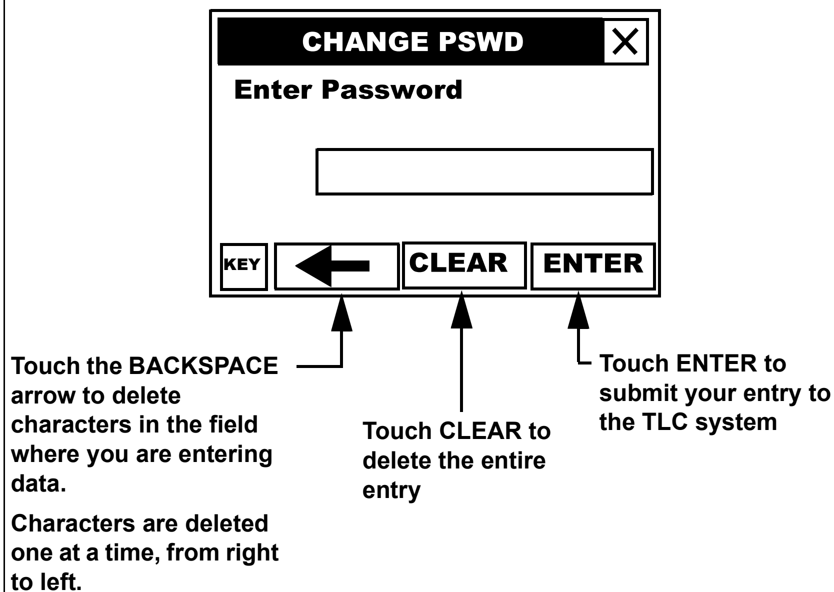
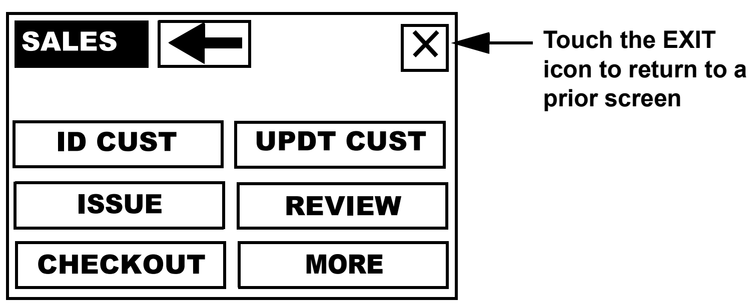
Using the Terminal’s Touch-Screen Design

The Hypercom unit uses a touch-screen design to navigate the software and perform specific tasks. The terminal does not use a mouse.

<table>
<tr><th>If you want to…</th><th>Touch the …</th></tr>
<tr><td>Select a task or sub-task</td><td>Button with the appropriate title.


</td></tr>
<tr><td>Move between screens</td><td>Arrow pointing in the direction you want to move.

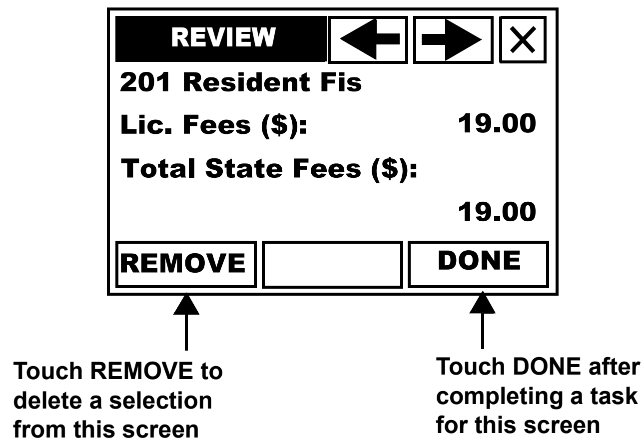

</td></tr>
</table>

If you want to…	**Touch the …**
Modify information you have entered or submit your information to the TLC system	Appropriate button to either modify or submit your entry. 
Leave the screen you are in and return to a preceding screen without losing data	**EXIT** icon in the upper right corner of the display. 

<table>
<tr><th>If you want to…</th><th>Touch the …</th></tr>
<tr><td>Perform other navigational tasks using the display</td><td>Appropriate button.

The navigational buttons at the bottom (or elsewhere) in the display guide you regarding the action you might want to take.

In this example use the two buttons at the bottom of the display to perform specific tasks.

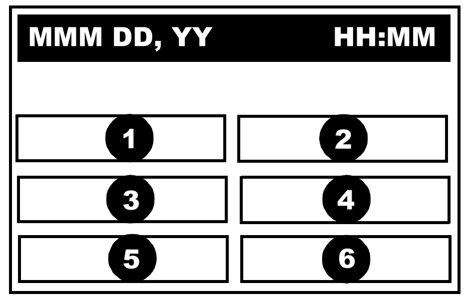
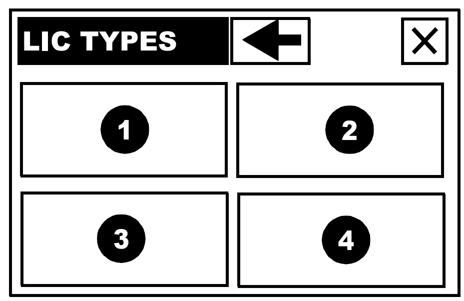
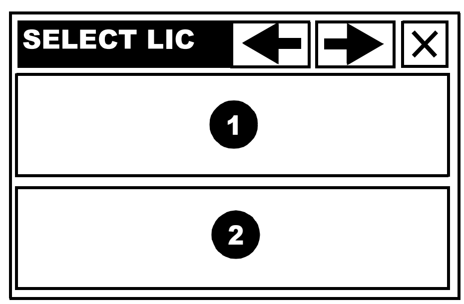

</td></tr>
</table>

Using Keyboard "Hot" Keys

On-screen selections can also be made using keys on the keyboard. These are called hot keys.

If you use these hot keys can make almost all of your selections without having your hands leave the keyboard.

In each of these examples the circled numbers match the number key you press on the keyboard.

To make a selection in a...	Press...
Six-item screen	
Four-item screen	
Two-item screen	

Unit II

Point of Sale Terminal

Lesson 2

Terminal Components

Lesson Objectives

When you finish this lesson you should be able to:

- Identify the hardware components of your point of sale terminal
- Describe the purpose of each component

Lesson Overview

All of your licensing transactions and administrative tasks are performed using the point of sale terminal.

In this lesson we identify and explain the purpose of the five components of the terminal.

Identifying the Terminal Components

The point of sale terminal consists of the following components:

- Stacker tray
- Hypercom unit
- External keyboard
- License printer
- Bar code scanner

Purpose of the Components

Stacker Tray

Place the Hypercom unit and license printer on top and the external keyboard on the slide-out tray.

Hypercom Unit

The Hypercom unit:

- Displays the menus, input screens, and data fields of the application
- Has touch screen capabilities to select tasks by touching the appropriate item on the screen
- Has an internal modem with a pre-set, toll-free number to dial up and connect to the TLC system
- Has a magnetic track reader to read:
    - Texas and American Association of Motor Vehicle Administrators (AAMVA) compliant driver licenses to retrieve customer information
    - Lifetime license cards
- Has a receipt printer to print:
    - Dealer receipts
    - Sales and administrative reports
    - TPW messages and on-line help topics

> **Note: Be sure you install the receipt paper so that the paper feeds off the bottom of the roll and into the printer.**
>
> **If the paper feeds off the top nothing will be printed.**

Keyboard

Use the keyboard to perform data entry tasks, such as entering:

- Your user ID and password
- Customer information when adding a customer to the TLC system
- Customer responses to the Harvest Information Program (HIP) survey and other TPW-required questions
- Electronic messages to send to TPW

License Printer

The license printer:

- Prints the customer's license document

> **Note: Observe the following with the license printer:**
>
> - **When you load the license media and ribbon, carefully follow the instructions provided with the printer and described in the training video**
> - **After loading the license media press the Feed button on the top of the printer several times, until the notch in the license media aligns with the slot in the printer.**
> - **Always tear off a license by holding it firmly and pulling up and across the serrated edge, from left to right. Do not pull the license toward you to separate it. This can cause the license media to become misaligned.**

Bar Code Scanner

Use the bar code scanner to:

- Retrieve a customer from the TLC system by scanning the:
    - Customer's identification number on a TPW license document
    - Document number on a TPW license document
    - Customer's lifetime license card

  Use the scanner whenever possible to quickly and efficiently retrieve a customer from the TLC system.
- Retrieve a license to be voided by scanning the document number on the license
- Select a license for purchase by scanning the license bar code on the Quick Reference Card.

> **Note: Before using the bar code scanner you need to program it.**
>
> **Instructions on how to program the scanner are included with the shipment of your scanner and other terminal components.**
>
> **The scanner will not work properly if you fail to perform this programming procedure.**

Lesson 3

Connecting to the TLC System

Lesson Objectives

When you finish this lesson you should be able to:

- Understand how your terminal connects to the TLC system
- Understand what happens when your connection is interrupted
- Connect two or more terminals to the same phone line
- Understand the personal computer option to sell licenses

Lesson Overview

Many licensing and administrative functions rely on a dial-up connection between the modem in your Hypercom unit and the TLC system. Sometimes this connection is interrupted. When an interruption occurs you can continue doing some functions, but not others.

Your location may also use multiple terminals. If so, you can connect more than one terminal using a single phone line, if you choose.

You also have the option of connecting to the TLC system through an internet connection, if you have a personal computer and modem.

In this lesson we will explain how your terminal connects to the TLC system, what you can do when your connection is interrupted, and how your terminal re-connects. We will also discuss the connection of multiple terminals to a phone line and the option of using a personal computer and an internet connection to sell licenses.

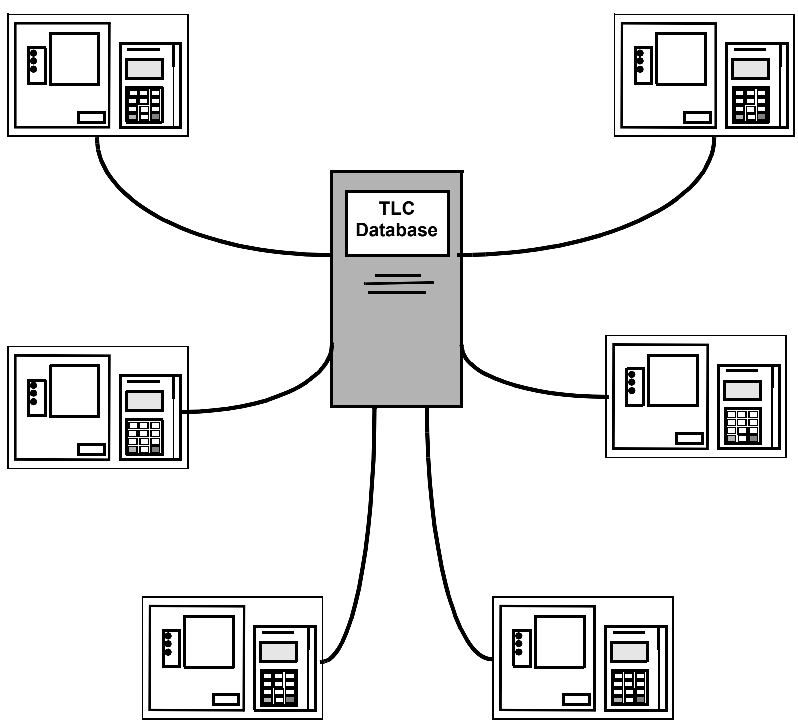
How Your Terminal Connects to the System

Telephone lines carry all transmissions between your point of sale terminal and the TLC system.

An internal modem in the Hypercom unit, with a pre-set, toll-free number that dials up the connection to the TLC system. When you are connected to the system you are working "on-line."

During each sale your terminal retrieves data from or transfers data to the TLC system.

The following illustration diagrams the connection:



Interrupted Connection

Your connection to the TLC system may be interrupted.

When the connection is broken you are working "off-line."

You will not know that you are disconnected until you run a process that requires your terminal to communicate with the TLC system.

For example, when you search for a customer you enter the information and then launch the search. This is when you will find out that your connection has been lost.

How Do I Know I Am Working Off-Line?

Generally there are two indicators that your connection has been lost.

The first is the following message:

WAITING FOR LINE

Normally this message appears momentarily on the screen. If it appears longer than 5 seconds it is probable that you do not have a connection.

The second is the following message:

RECEIVE MSG FAILED

Touch **OK** or press **ENTER** to clear this message.

The application displays the next message, such as:

NO RECORDS FOUND

Touch **OK** or press **ENTER** to clear the message and return to the MAIN menu.

You can continue processing certain customer transactions when working off-line. Customer information and license selections for off-line sales are temporarily stored in a database in your terminal.

Restoring the Connection

When the connection is restored your terminal automatically transmits the information stored in its database.

The transmission occurs when you launch a process, such as searching for a customer, which relies on the dial-up connection to the database to complete.

The system then updates your customer’s information and license transactions in the TLC database.

When Working Off-Line

When working off-line you can perform only specific functions, processes, and operations.

Functions Available When Working Off-Line

These functions are available even though your connection to the TLC system is interrupted.

Licensing	• Log on • Swiping a Texas driver license or Lifetime License card • Add customers • Issue licenses • Cancel a transaction • Print the customer’s license document • Print the dealer receipt
Terminal-Related	• Log off • Change your password • Use the Help feature
Management-Related	• Authorize terminal users • Configure terminal (most options)

Functions Not Available When Working Off-Line

These functions are not available if your connection to the TLC system is interrupted.

Licensing	• Search for customers in the TLC system • Update customer information • View a customer's current holdings • Perform license overrides • Void licenses • Replace licenses
Terminal-Related	• Receive TPW messages • Process End Shift reports
Management-Related	• Generate and print sales and administrative reports • Manage terminal stock • Process mail • Process software updates

Connecting Multiple Terminals

Locations with multiple terminals can connect those terminals to a single phone line using a phone splitter.

However, note that terminals cannot be used simultaneously in this arrangement.

Also, individuals selling licenses need to be authorized to use each of the terminals. In this arrangement authorization to use one terminal does not convey authorization to use another terminal.

Connecting Through the Internet

As a licensing agent you have the option of using a personal computer (PC) to sell licenses. Licensing through a PC is done on the internet. You can switch to the PC-based version if you provide a PC and an internet connection.

You can perform all licensing activity using either version however, the screen displays are different. The PC-based version uses a full-sized monitor as opposed to the reduced display area on the Hypercom unit.

In the future, if you want to switch to the PC-based version, contact TPW.

Unit III

Logging On

Lesson 4

Logging On

Lesson Objectives

When you finish this lesson you should be able to:

- Log on to your point of sale terminal to perform licensing and other tasks
- Select or bypass training mode
- Select a task from the MAIN menu

Lesson Overview

To use the point of sale terminal you need a user ID and password. Both are assigned to you by the person at your location responsible for authorizing new users.

After logging on you have the option of selecting training mode or bypassing training mode and using the system "live."

In this lesson we will show you how to:

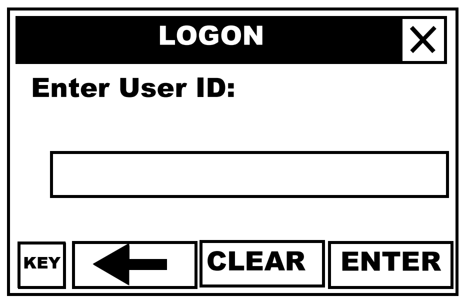
- Log on
- Select or bypass training mode
- Select your task from the MAIN menu

Logging On

To Demonstrate - Logging On

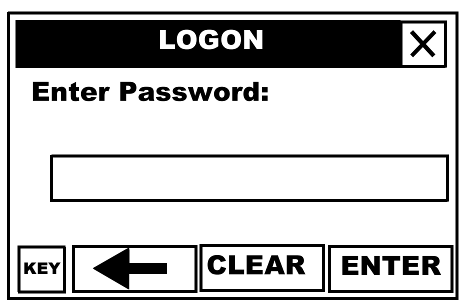
Step 1

Type your user ID and touch or press **ENTER**.



Step 2

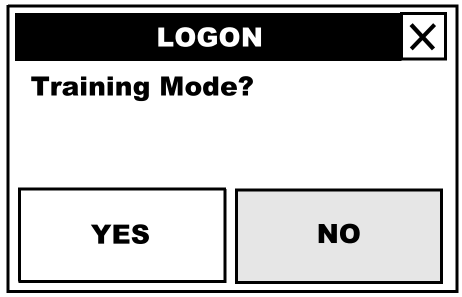
Type your password and touch or press **ENTER**.



Step 3

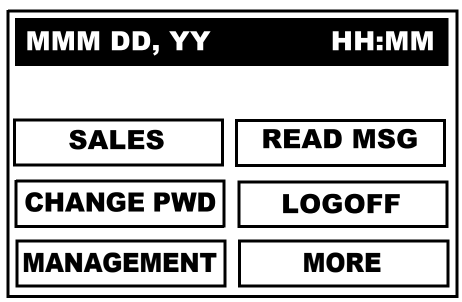
Options:

- Bypass Training Mode by touching **NO** or pressing **ENTER**.
- Select Training Mode by touching **YES** or pressing **ESC[APE]**.



Touch **NO** or press **ENTER** to continue.

The MAIN menu appears.



In Training Mode

In training mode you can practice all the procedures and tasks that you have been authorized to do.

In training mode the MAIN menu screen title changes to "Training Mode."

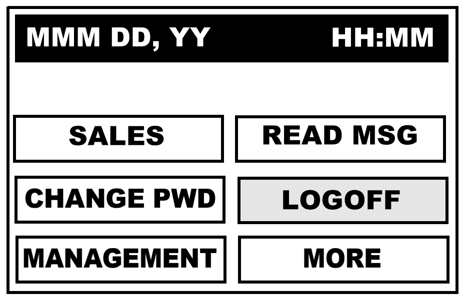
Licenses printed in training mode are clearly marked as training and cannot be used in place of actual licenses.

Information you submit to the training database will not be retained.

Periodically all information in the training database is deleted. This means you may not be able to retrieve information, such as a customer, from the database the following day.

Exiting Training Mode

Exit training mode by touching **LOGOFF** on the MAIN menu.



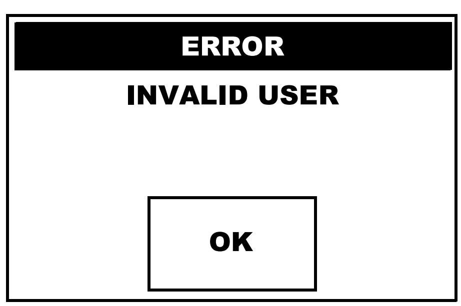
Incorrect User ID or Password

Typing an incorrect user ID or password will cause your logon to fail.

To Demonstrate - Invalid Log On

Step 1

If you enter an incorrect user ID the following message appears:

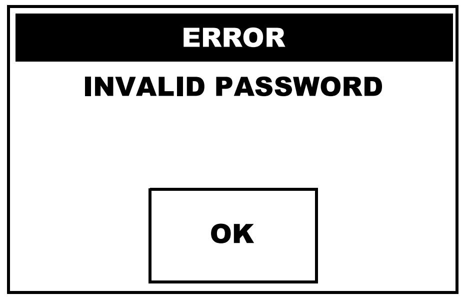


Step 2

Touch **OK** or press **ENTER** to clear the message, then re-enter your user ID.

Step 3

If you enter an incorrect password the following message appears:



Step 4

Touch **OK** or press **ENTER** to clear the message and continue.

Step 5

Re-enter your user ID and password. If entered correctly the training mode option appears.

Step 6

Make your training mode selection and proceed to the MAIN menu.

Locked Out

You may see the message "Locked Out" when you try to log on. This condition could be:

- A technical problem, or;
- An administrative lock out from TPW

Call the Help Desk - (866) 852-8793 - for assistance.

When to Log On

You need to log on when:

Terminal times out	If the terminal is inactive for approximately three minutes the terminal times itself out, logs off the user, and resets the application to the User ID Logon screen
Loss of power occurs	Whenever power to the terminal is disrupted the next user needs to log on to use the terminal
The previous user logged off	A previous user will usually log off after: • A licensing transaction has been completed and another transaction is not expected immediately • A management tasks has been completed • Exiting from training mode.

Practice Exercise

In this exercise you will practice:

- Logging on using the Clerk's user ID and password
- Entering the wrong password and correcting the error

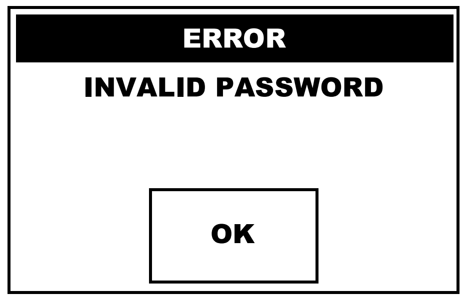
Logging On

1. Type the Clerk's user ID, then touch or press **ENTER**.
2. Type the Clerk's password, then touch or press **ENTER**.
3. Bypass training mode - touch **NO** or press **ENTER**.
4. Touch **LOGOFF** on the MAIN menu to return to the User ID Logon screen.

Typing the Wrong Password

1. Type the user ID for the Clerk, then touch or press **ENTER**.
2. Type a wrong password, then touch or press **ENTER**.

   The Invalid Password message appears.



3. Touch **OK** or press **ENTER**.
4. Type the Clerk's user ID again, then touch or press **ENTER**.
5. Type the clerk's password again, then touch or press **ENTER**.
6. Bypass training mode - touch **NO** or press **ENTER**.

The MAIN menu appears.

Stop Here

Unit IV

Licensing Transactions

Lesson 5

Gathering Customer Information

Lesson Objectives

When you finish this lesson you should be able to:

- Retrieve an existing customer
- Select a customer from matching customers
- Add a customer to the TLC system
- Update information on an existing customer

Lesson Overview

Before issuing or replacing a license you need to know whether or not your customer is in the TLC database.

If so, after retrieving the customer, you can begin selecting licenses for purchase. If not, you need to first add the customer.

A person is in the database after they purchase their first license or license-related item *through the TLC system and receive a TLC ID number*.

In this lesson we will show you how to search for a customer using three different methods and how to add a customer to the database. We will also explain what the TLC ID number is and why it is important.

Searching for Your Customer

Search for your customer in one of three ways.

If unsuccessful the first time try two more times, for a total of three tries, before adding the individual to the system as a new customer.

Making three attempts helps to avoid duplicating a customer's record in the database.

Methods

These are the three search methods:

Method	Explanation
Bar code scanner	Scan the: • Customer ID number (TLC ID#) bar code on the TPW license document; or • Document ID number bar code on the TPW license document; or • Customer's identifying bar code on their Lifetime License card
Magnetic strip reader	Swipe the customer's: • Texas driver license; • Lifetime License card. (Driver licenses from other states can also be swiped if they follow the Texas format)
Search parameters and keyboard	Select a search parameter from the application and key in specific data.

Note: Using the bar code scanner or the strip reader is the quickest, most efficient way to retrieve a customer from the database.

Results

Your customer will either be retrieved from or has to be added to the database.

If your customer is...	Then your customer has...	And you need to...
Found	• Been assigned a TLC ID number; and • Previously purchased a license	1. Confirm that this is the correct customer 2. Update any changes in information 3. Complete the license transaction
Not found (after three search attempts)	Not purchased a license through the TLC system	1. Add the customer to the system 2. Complete the license transaction

Customer Not Found

If the customer is not found the system returns the following message:

NO RECORD FOUND

TLC ID

TLC ID # stands for Texas License Connection identification number and has the following characteristics:

Assigned to each customer	Each customer who purchases a license or license-related item receives a unique TLC ID number.
Unique, system generated number	This number is generated by the system and remains a part of the customer's record for as long as the customer is in the TLC database.
Quick retrieval	Because it is a unique number, like your driver license or social security number, it is an efficient way to retrieve your customer from the system.
On TPW license document	This number is printed on each license purchased by a customer. On the license look for the Cust #.
Use bar code scanner	The bar code scanner can scan the Cust # on the license to retrieve a customer.

To Demonstrate - Bar Code Scanner

Step 1

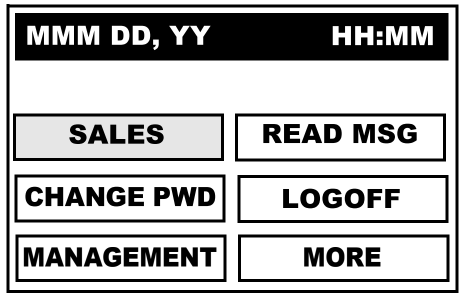
Log on (if necessary).

Step 2

Bypass training mode.

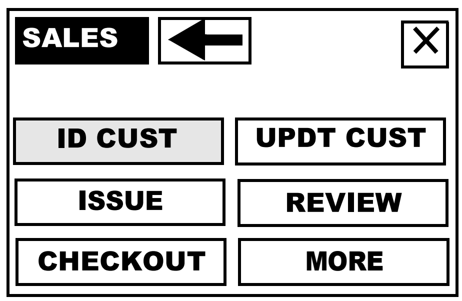
Step 3

Touch **SALES** from the MAIN menu.



Step 4

Touch **ID CUST** from the SALES menu.

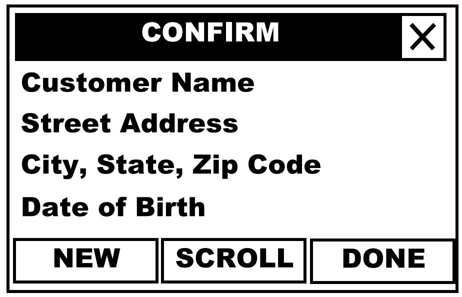


Step 5

Scan Cust # bar code on license.

Step 6

Review the CONFIRM screen with the customer to verify that you have retrieved the correct person.



Using Search Parameters and Keyboard

Search for a customer using a specific search parameter and the keyboard to key in data.

Search parameters and data prompts are pre-defined.

Search Parameter	Data Prompts
DL NUMBER	Key in the: • State in which the license was issued (use two-character Postal Service code) • Driver license number
NAME & DOB	Key in the customer's: • First name • Last name • Date of birth [format: MM/DD/YYYY]
NAME/PH #	Key in the customer's: • First name • Last name • Phone number [format: 0000000000]
SSN & DOB	Key in the customer's: • social security # [format: NNNNNNNNN] • Date of birth [format: MM/DD/YYYY]

Search Parameter	Data Prompts
TLC ID	Scan or key in the customer's TLC ID# (CUST#) from the license document
DOC ID	Scan or key in the DOC # from the license document.

Note: TPW recommends using the NAME/PH # search parameter after other methods have been tried.

To Demonstrate - Using Parameters and Keyboard

Step 1

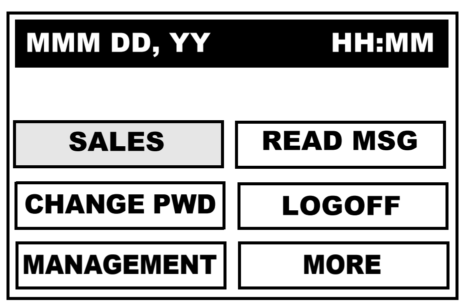
Log on (if necessary).

Step 2

Bypass training mode.

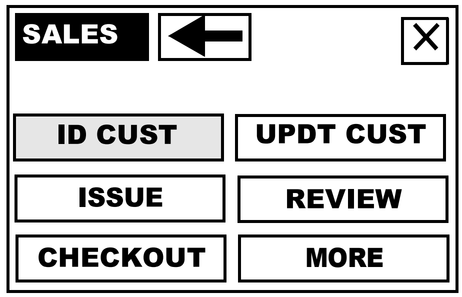
Step 3

Select **SALES** from the MAIN menu.



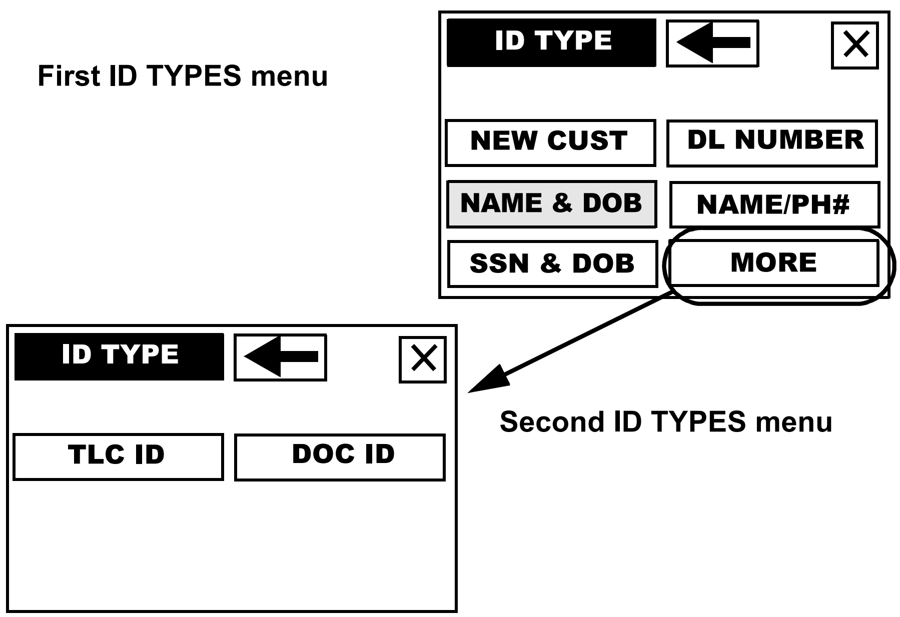
Step 4

Select **ID CUST** from the SALES menu.



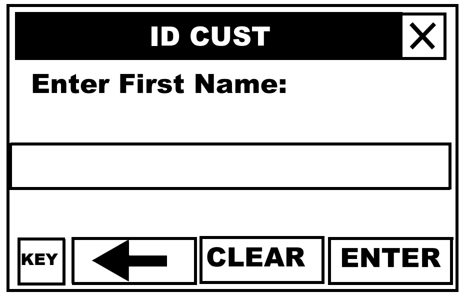
Step 5

Select a search parameter from the ID TYPES menus. In this example NAME & DOB is selected.

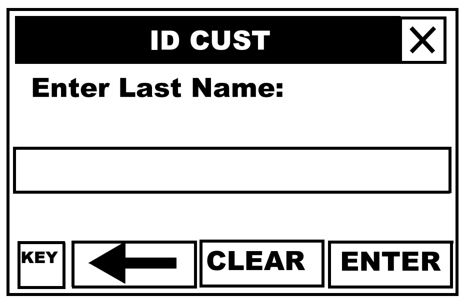


Step 6

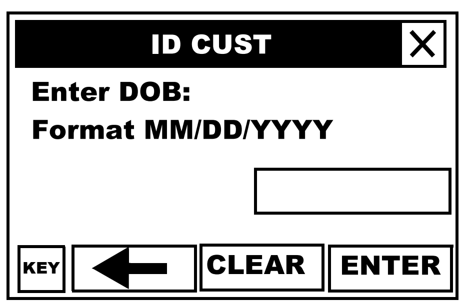
Key in information from prompts.



Enter first name and touch or press **ENTER**.



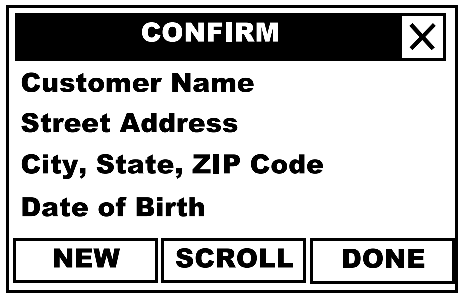
Enter last name and touch or press **ENTER**.



Enter the customer's date of birth and touch or press **ENTER**.

Step 7

A successful search returns a customer record.



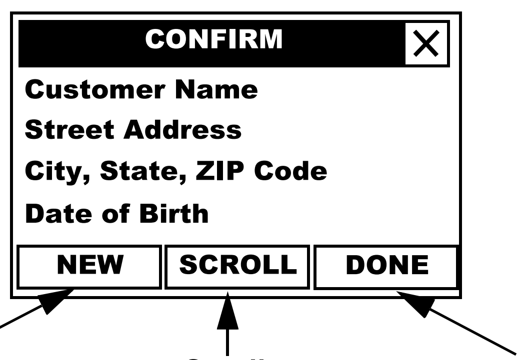
Selection Options

The CONFIRM screen displays the customer's record.

Make sure this is the correct customer by asking them to verify their:

- Address; and
- Date of birth

Options available from this screen include:



New

Touch NEW to go directly to the screens used to add a new customer to the TLC system.

Scroll

Touch SCROLL to view more of the customer's record.

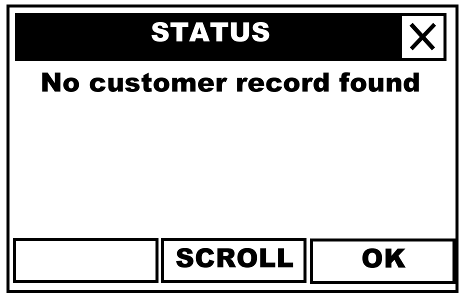
Sometimes the date of birth information is on the next screen.

Done

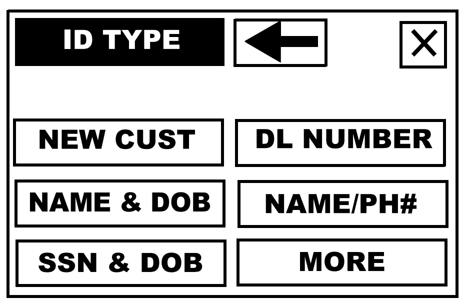
Touch DONE (or touch/press ENTER) if the customer displayed in the CONFIRM screen is your customer.

No Record Found

When your search does not find a match the following message appears.



Select **OK** or touch or press **ENTER** to clear the message. The application returns to the ID TYPE menu so you can perform another search.



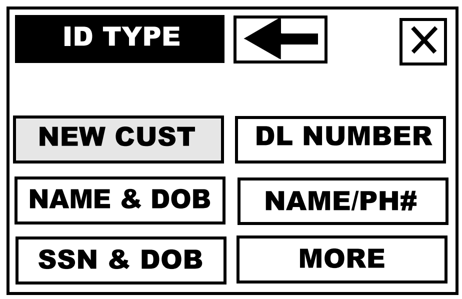
Note: If your customer does not have a TPW license or TPW lifetime license card with a bar code then you have to use either the customer's driver license or one of these parameters to search for your customer.

Remember to perform at least three searches using different methods or parameters before adding the individual to the TLC system as a new customer.

Adding a Customer to the TLC System

If three searches are unsuccessful add your customer to the TLC system.

Touch **NEW CUST** on the ID TYPE menu to begin the process.



These are the available screens for adding a new customer.

Fields with an asterisk (*) indicate fields where you must enter data. These are called "required fields."

Category	Field	Description/Explanation
Name	• First name*	
	• Middle name	
	• Last name*	
	• Suffix	Such as Jr.
Physical characteristics	• Gender	M/F
	• Height	Ft.
	• Height	In.
	• Eye color	Default - XXX Unknown If known, clear and type three character code for eye color
	• Hair color	Default - XXX Unknown If known, clear and type three character code for hair color)

Category	Field	Description/Explanation
Date of birth (DOB)	• Date of birth*	Format - MM/DD/YYYY
Social Security Number	• Social security number	Format - NNNNNNNNN
Country of residence	• Country USA?*	Default - Yes; clear and type N [No] if customer's country of residency is other than USA
	• Country*	Default - USA; if country of residency not USA this is a required field, type country
Driver license	• State where issued	Use two-letter Postal Service code
	• Driver license number	No format
State residency	• Texas resident *	Y/N
[Residential]	• Street address*	
Address	• Street address (L2)	Second line for apt. or unit
	• City*	
	• State*	Default - TX Enter state if not a Texas resident
	• State/Province*	Required if not a Texas resident
	• Postal Code*	Required if not a Texas resident
	• Zip code*	
	• Zip code+4	
Phone Number	• Phone number	Format - 0000000000
Mailing Address	• Mailing address same as residential*	(Y/N)
	• Mailing address*	Required if mailing address is different from residential address
	• Mailing address (L2)	Second line for apartment or unit
	• Mailing city*	Required if mailing address is different from residential address

Category	Field	Description/Explanation
	• Mailing country USA?	Default - Yes
	• Mailing country*	Default - USA Required if mailing country is other than USA
	• Mailing State/ Province*	Required if mailing country is different from USA
	• Mailing postal code*	Required if mailing country is different from USA
	• Mailing state*	Required if mailing address is different from residential address
	• Mailing zip code*	Required if mailing address is different from residential address
	• Mailing zip code+4	

Practice Exercise

In this exercise you will:

- Enter a new customer to the TLC system

Logging On and Accessing New Cust

1. Log on using the Clerk user ID and password.
2. Touch or press **ENTER** to bypass training mode.
3. Touch **SALES**.
4. Touch **ID CUST**.
5. Touch **NEW CUST**.

Type Customer Information

1. Type customer information into the terminal from the following table.

2. Touch or press **ENTER** after typing information in each field to continue.

Points to remember:

- This is a "made-up" customer. Use your imagination to fill in customer information.
- Write down the customer information in this table as you proceed. You will need to refer back to this information later in training
- Guided entries, such as N/A for middle name, and default entries are noted in the table.

First name			
Middle name		**N/A**	
Last name			
Gender	**M/F**		
Height (FT.)			
Height (IN.)			
Eye color	**(see table below)**		
Hair color	**(see table below)**		
Date of birth	**MM/DD/YYYY**		**Use a date in 1970**
Social Security #	**NNNNNNNNN**		
Country USA?		**Y**	
Country		**USA**	
Driver license state		**TX**	
Driver license #	**8 digits**		
State resident		**Y**	
Street address			
Street address			

City		
State		**TX**
Zip Code		
Zip Code+4		**N/A**
Phone number	**NNNNNNNNNN**	
Mailing address same?		**Yes**

Eye and Hair Color Codes

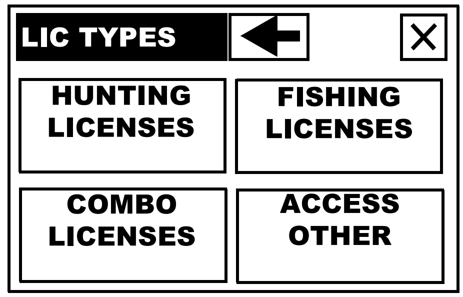
Use these three-character codes for eye and hair color.

Eye Color	
Black	BLK
Blue	BLU
Brown	BRO
Gray	GRY
Green	GRN
Hazel	HAZ
Maroon	MAR
Multi	MUL
Pink	PNK
Unknown	XXX

Hair Color	
Black	BLK
Blonde	BLN
Brown	BRO
Gray	GRY
Red	RED
Sandy	SDY
White	WHI
Unknown	XXX

When You Finish

After the last entry the LIC TYPES screen appears. Do not continue.



Stop Here

Matching Customers

Sometimes more than one customer fits the search criteria.

You have to decide which of these customers is your customer or whether or not any of these customers are yours.

To Demonstrate - Matching Customers

Step 1

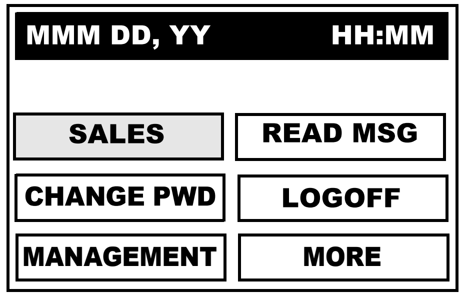
Log on (if necessary)

Step 2

Bypass training mode.

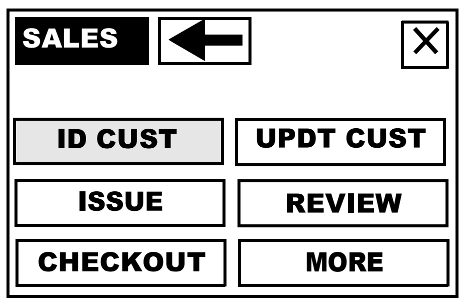
Step 3

Touch **SALES** on the MAIN menu.



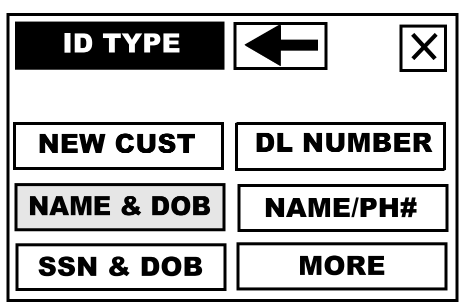
Step 4

Touch **ID CUST** on the SALES menu.



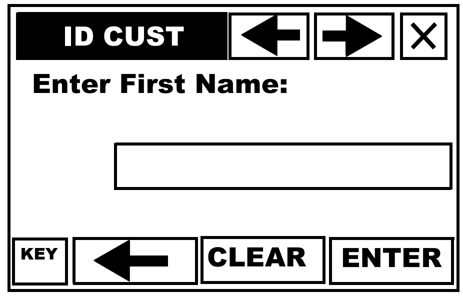
Step 5

Touch **NAME AND DOB** on the ID TYPE menu.

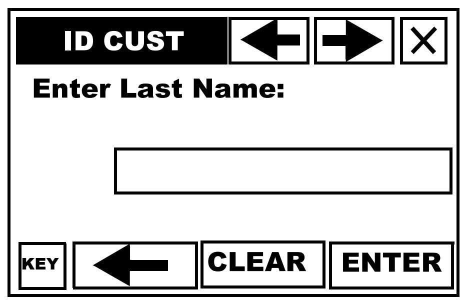


Step 6

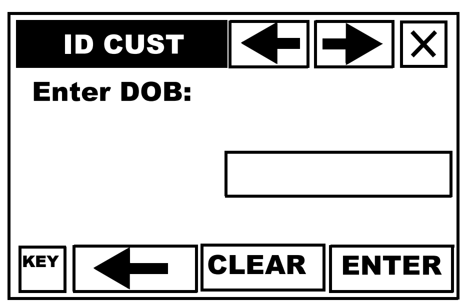
Type the first name:



Type the last name:

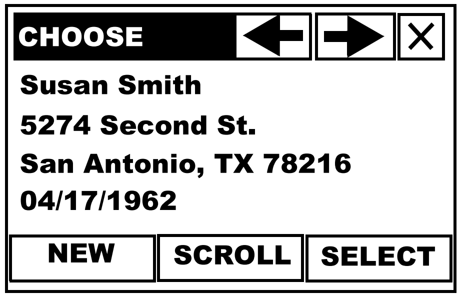


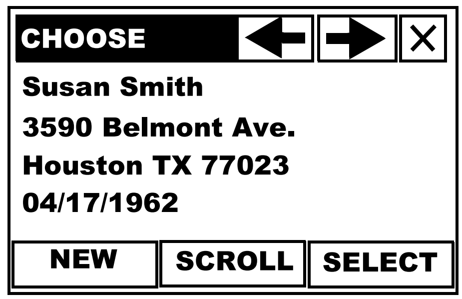
Type the date of birth:



Potential customers matching the search criteria appear in the CHOOSE screen.

Use the **FORWARD** and **BACK** arrows to view all the customers.



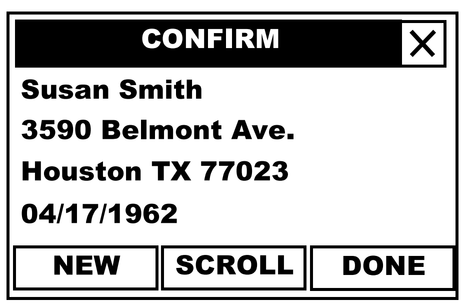


Notice that the names and date of birth are the same but each customer has a different address. This helps you decide which, if any of these customers, is the right one.

Step 7

Touch **SELECT** for your customer.

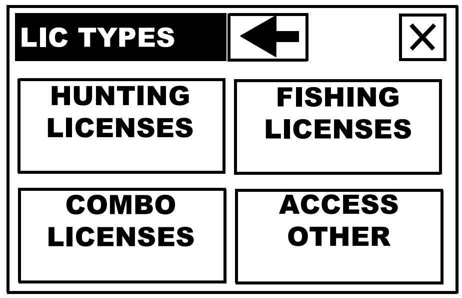
The CONFIRM screen appears.



Step 8

Touch **DONE**.

The LIC TYPES screen appears.



Options

If you...	Then...
Find more than one customer matching the search parameters...	1. Select the correct customer 2. Verify that their personal information, such as address, phone number or driver license has not changed 3. Complete transaction
Do not find a match among the customers retrieved...	1. Search for the customer using alternative methods or search criteria 2. If found verify that their personal information, such as address, phone number or driver license has not changed 3. Complete transaction OR, IF NOT RETRIEVED AFTER THE THIRD ATTEMPT: 4. Add customer to the database 5. Complete transaction

Updating Your Customer's Information

Always ask your customer if any of their information has changed.

Events like a move or marriage may outdate the information in the customer's record.

Note: Maintain the integrity and accuracy of the TLC system by always asking your customer if any information has changed.

This benefits both the customer and TPW.

To Demonstrate - Updating a Customer's Record

Step 1

Log on (if necessary)

Step 2

Bypass training mode.

Step 3

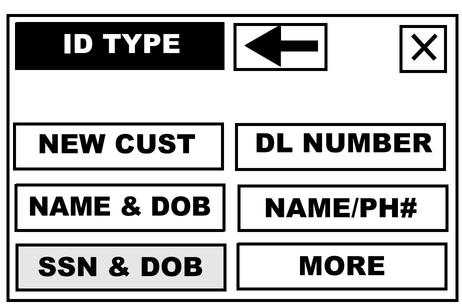
Touch **SALES** on the MAIN menu.

Step 4

Touch **ID CUST** on the SALES menu.

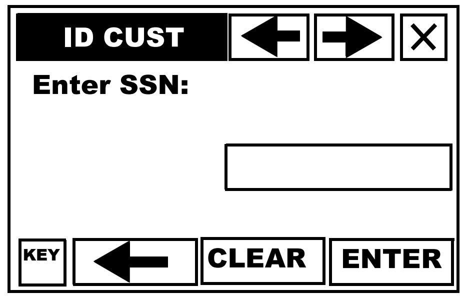
Step 5

Touch **SSN & DOB** on the ID TYPE menu.

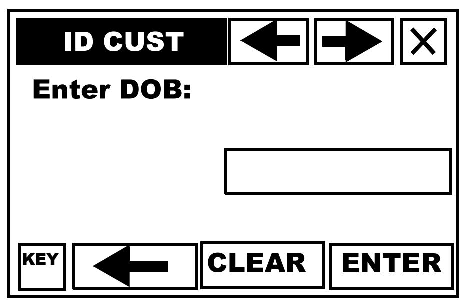


Step 6

Type the Social Security Number:

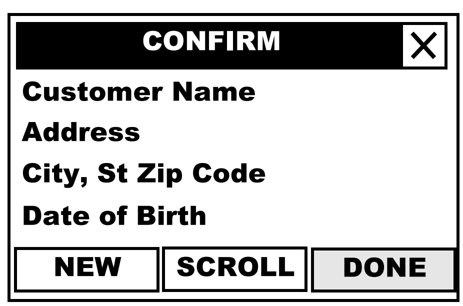


Type the date of birth:

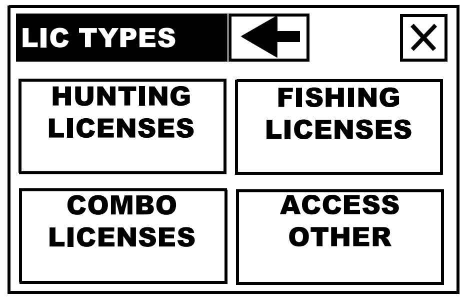


Step 7

Touch **DONE** or press **ENTER** to confirm customer.

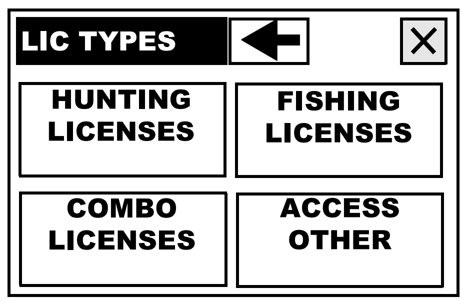


The LIC TYPES screen appears.



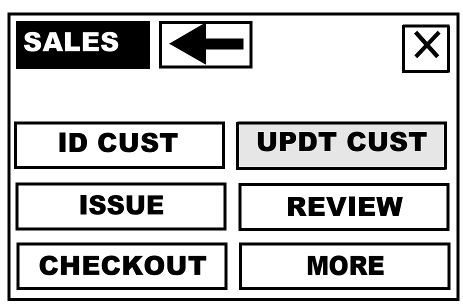
Step 8

Touch the **EXIT** icon to return to the SALES menu.



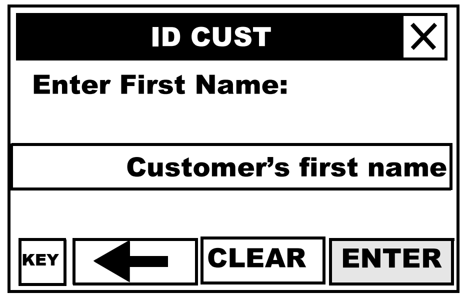
Step 9

Touch **UPDT CUST** on the SALES menu.



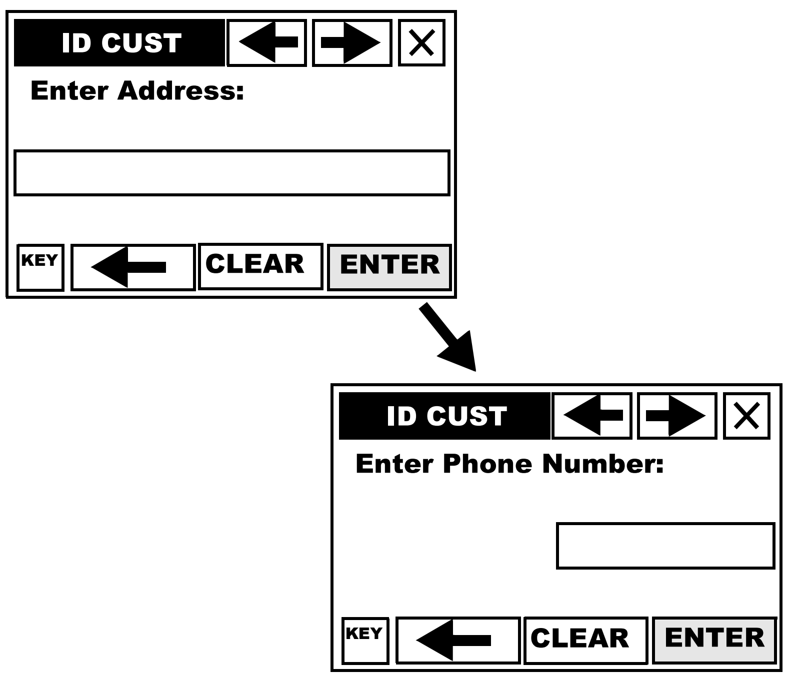
Step 10

Touch the **FORWARD** arrow multiple times to advance to the first address screen.



Step 11

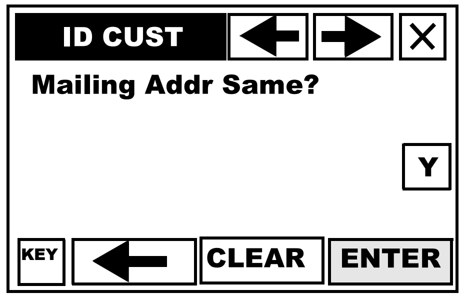
Update the customer's complete address in each of the address prompts and the customer's phone number.



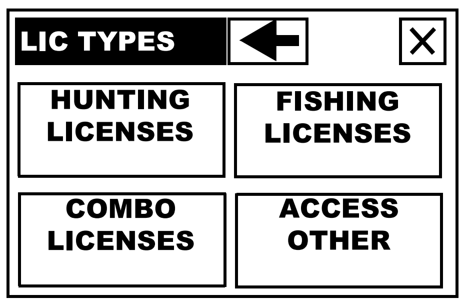
Step 12

Mailing address is the same as the residence address in this example.

Touch or press **ENTER** to continue.



When finished the LIC TYPES screen appears.



Practice Exercise

In this exercise you will:

- Retrieve a customer from the database.

  Use the customer record assigned to your terminal.
- Update the customer's address information.

Retrieving the Customer

1. Log on using the Clerk user ID and password.
2. Touch **NO** or press **ENTER** to bypass training mode.

3. Touch **SALES** on the MAIN menu.
4. Touch **ID CUST** on the SALES menu.
5. Touch one of the search parameters on the first ID CUST menu.
6. Type the search information requested for each prompt, pressing **ENTER** after completing the input.
7. Touch **DONE** or press **ENTER** to confirm your customer.
8. Touch the **EXIT** icon to return to the SALES screen.

Updating the Customer's Record

1. Touch **UPDT CUST**.
2. Touch the **FORWARD** arrow or press **ENTER** to advance to the first address screen.

   Type information into each screen listed in the table.

   Write the information you enter for each of these screens in the following table. Include an apartment or unit number.

Address	
Address (L2)	
City	
State	
Zip Code	
Zip Code+4	
Phone number	
Mailing address same?	Y

3. Touch or press **ENTER** at the MAILING ADDRESS SAME? screen.

   The SALES screen appears.

Stop Here

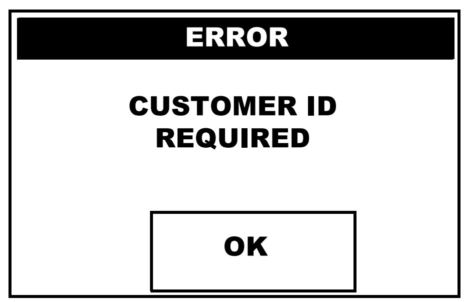
Common Error Messages

When you begin a licensing transaction you may encounter these error messages.

Customer ID Required

The application enforces the process of completing the customer retrieval step first before continuing with a license transaction.

If customer identification is required before proceeding the following message appears.



Touch **OK** or press **ENTER** to clear the message.

Retrieve or Add Customer First

Always complete the customer-associated steps of a licensing transaction first.

The only exception to this rule is voiding a previously issued license.

Missing Fields Required

You cannot complete a licensing transaction if data is missing from any required field.

The following message appears:

Touch **OK** or press **ENTER** to clear the message.

Complete Customer Data Input First

A good guideline to follow is to complete all data entry first.

If you exit the entry process early, by touching the **EXIT** icon on any of the ID CUST screens, the application takes you back to the Sales screen where you will need to start over.

Before you can complete the transaction, however, the application forces you to return to the ID CUST screens to add the required information.

Lesson 6

Issuing a License

Lesson Objectives

When you finish this lesson you should be able to:

- Select the license a customer wants to buy
- Print the license document and your dealer receipt
- Cancel a transaction
- Select the license year for the license
- Understand why not all licenses may be available for sale

Lesson Overview

After you gather the customer's information you are ready to issue a license.

In this lesson we will show you how to complete your license transaction by selecting a license, reviewing the selection and fees with your customer, and printing the license document and your dealer receipt.

We will also show you how to cancel a transaction, how to select the license year if you are issuing licenses at the end of the current license year, and why not all licenses may appear on your point of sale terminal.

Overview of Steps to Issuing License

Each time you issue a license you will follow this same procedure:

Step	Action
Step 1	Retrieve or add your customer
Step 2	Select license If necessary: • Complete a HIP survey for the customer • Enter any ancillary customer data
Step 3	Review selected license(s) and fees
Step 4	Verify the purchase (checkout)
Step 5	Indicate customer's method of payment
Step 6	Type your password
Step 7	Verify printed license document is properly aligned
Step 8	• Verify with customer that all personal and license-related information on the license document is accurate • Have customer sign back of license

Steps to Issuing a License

To Demonstrate - Issuing a License

The demonstration follows the steps outlined above.

Step 1: Retrieve or Add the Customer

Step 1

Log on (if necessary).

Step 2

Bypass training mode.

Step 3

Touch **SALES** on the MAIN menu.

Step 4

Touch **ID CUST** on the SALES menu.

Step 5

Select a search parameter on the ID TYPE screen and initiate search.

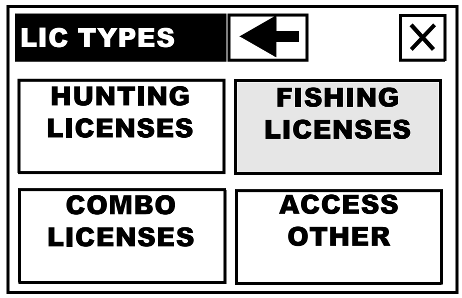
Step 6

Touch **DONE** on the CONFIRM screen or press **ENTER** to confirm the retrieved customer.

Step 2: Select the License

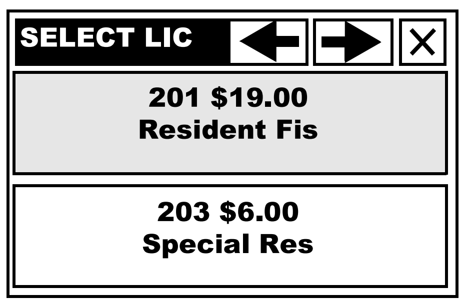
Step 1

Select **FISHING LICENSES** on the LIC TYPES menu.



Step 2

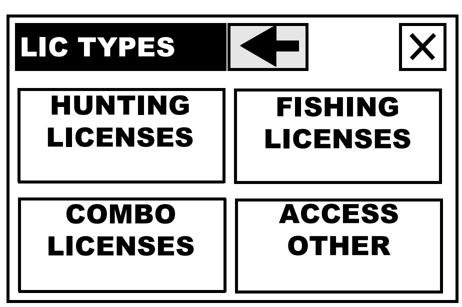
Select **201 RESIDENT FISHING** on the SELECT LIC menu.



The application returns to the LIC TYPES screen.

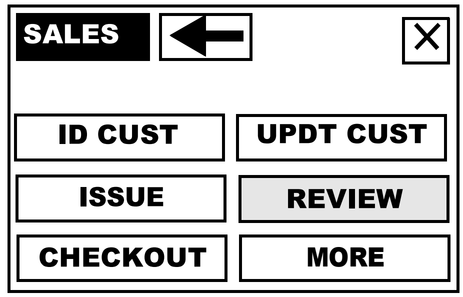
Step 3

Touch the **BACK** arrow to return to the SALES menu.



Step 4

Select **REVIEW** on the SALES menu.



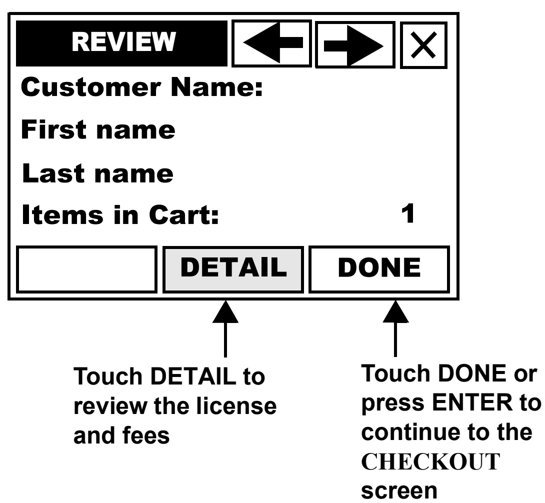
The REVIEW screen appears.

Step 3: Review the Selected License and Fee

Step 1

Option:

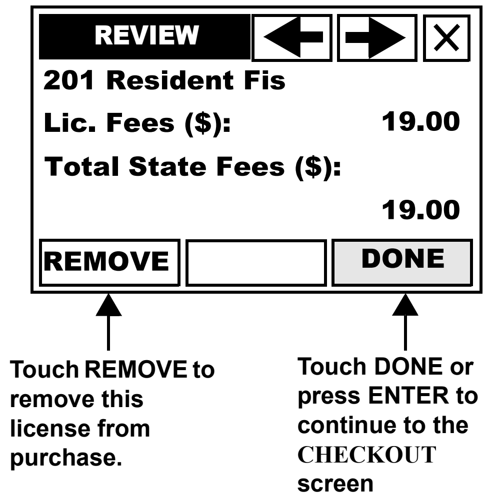
- Continue to CHECKOUT screen without viewing license detail
- Review license detail with customer



Touch **DETAIL** to review the license and fees.

Step 2

Review the details of the purchase.

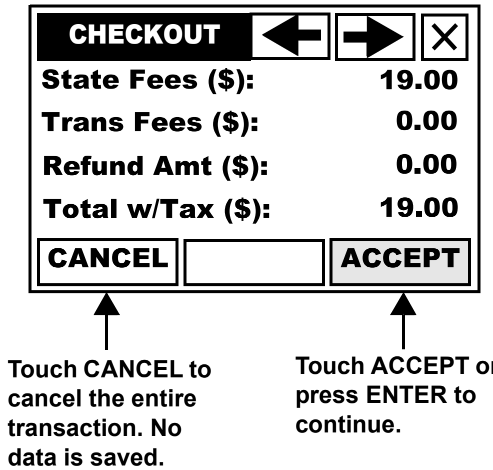


If the customer wants to continue with the purchase touch **DONE** or press **ENTER**.

The CHECKOUT screen appears.

Step 4: Verify the Purchase

The CHECKOUT screen provides the total amount due from the customer.



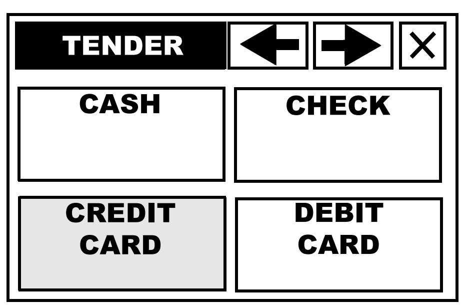
Touch **ACCEPT** or press **ENTER** to continue.

The TENDER screen appears.

Step 5: Indicate Method of Payment

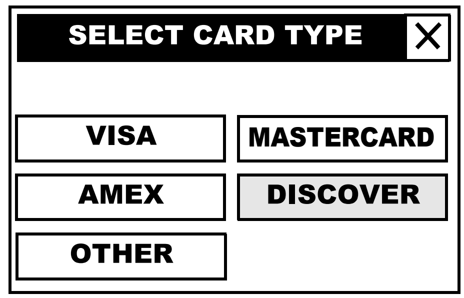
Step 1

Touch the customer's method of payment. In this example our customer is using a credit card.



Step 2

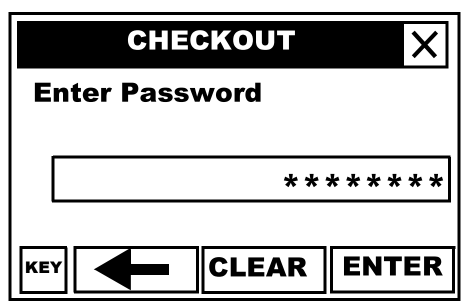
Indicate which card the customer is using.



The password screen appears.

Step 6: Type Your Password

You must type your password at the completion of a licensing transaction.



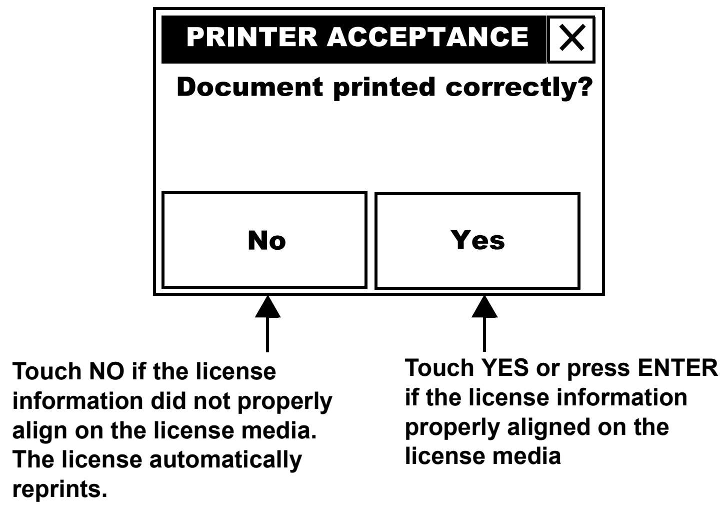
If you are the user who was logged on at the beginning of the transaction then the license and dealer receipt are printed.

If you are not the user logged on when you began the transaction then you must log on now.

Step 7: Check Alignment of the Printed License

Check the alignment to make sure the license and tags are properly positioned on the license. No tag should overlap a perforation.

After the license prints the following message appears:



If a tag overlaps a perforation you must reprint the license. Misalignment invalidates a license.

Step 8: Verify Information on the License with Your Customer

Before giving the license to the customer:

1. Review the information on the license, making sure that you have:
   - Entered the customer's information correctly
   - Selected the license the customer wanted to purchase

2. Have the customer sign the back of the license

Practice Exercise

Trainer:

Tell students to save license from this practice.

It will be used in a later lesson

In this exercise you will:

- Retrieve a customer from the database

  Use the customer record assigned to your terminal.
- Issue a Resident Fishing license
- Print the license and dealer receipt

Retrieve the Customer

1. Log on using the Clerk user ID and password.
2. Bypass training mode.
3. Touch **SALES** on the MAIN menu.
4. Touch **ID CUST** on the SALES menu.
5. Touch a search parameter.
6. Type customer information from the customer data sheet according to the information requested in the prompts.

   Touch or press **ENTER** after typing information in each screen.
7. Touch **DONE** or press **ENTER** to confirm your customer.

Select the License

1. Touch **FISHING LICENSES** on the LIC TYPES menu.
2. Touch **201 RESIDENT FISHING** on the SELECT LIC menu.
3. Touch the **BACK** arrow to return to the SALES screen.

Review the Selected License and Fee

1. Touch **REVIEW** on the SALES menu.
2. Touch **DETAIL** to view the license and fees.
3. Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.

Verify the Purchase

1. Review the fees on the CHECKOUT screen.
2. Touch **ACCEPT** on the CHECKOUT screen or press **ENTER** to continue to the TENDER screen.

Indicate Method of Payment

1. Touch **CREDIT CARD**.
2. Touch a credit card type (not Other).

Type Your Password

1. Type the Clerk password.
2. Touch or press **ENTER**.

Check Alignment of the Printed License

1. Check to make sure the license content aligned properly on the license media.
2. If so, touch **YES** or press **ENTER**.
3. If not, touch **NO** or press **ESC[APE]** to reprint the license.

Stop Here

License Document and Dealer Receipt

For each license transaction at least one license and one dealer receipt is printed.

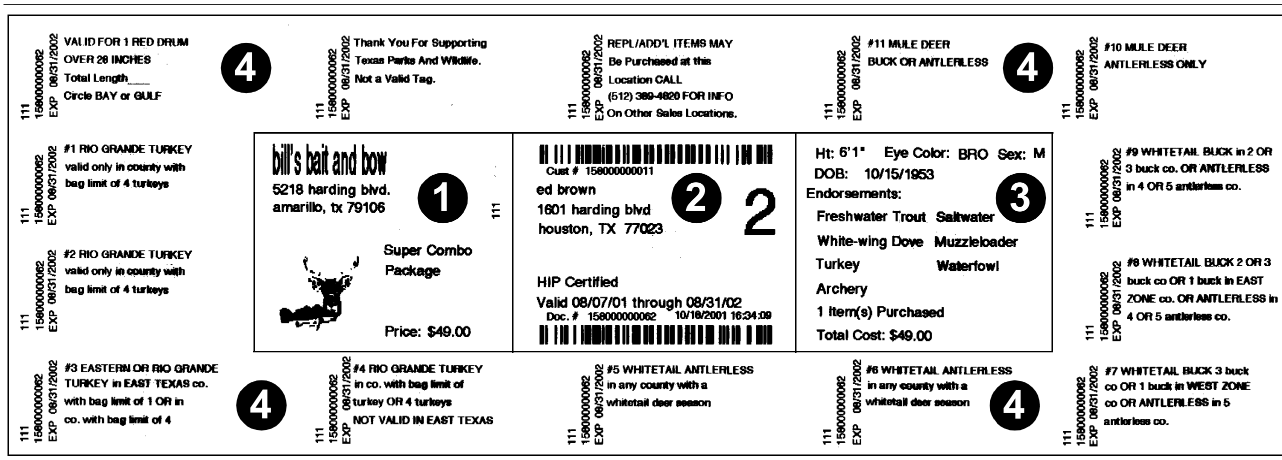
Retain the dealer receipt. It is for your records; it is not the customer's receipt.

License Document

The license document provides the following information:

- Customer information
- TLC ID number and license document number
- License or licenses purchased and fees
- Tags and endorsements

The following sample license details the contents of a license document:



Section	Contents
❶	• Agent information • License description • License fee
❷	• Cust # in numeric and bar code format (this is the customer's TLC ID #) • Customer's name and address • Single, large numeral is the last digit of the license year • HIP certification (if customer responded to a certification survey) • Valid dates for the license • Date and time license was issued • Doc # in numeric and bar code format
❸	• Customer's physical characteristics (if provided when entered as a new customer - not required fields) • Customer's date of birth • Endorsements • Number of items purchased • Total cost
❹	• Fourteen spots on the license perimeter for tags (not all spots may contain tags) • Perforated for detaching from license

Detaching Tags

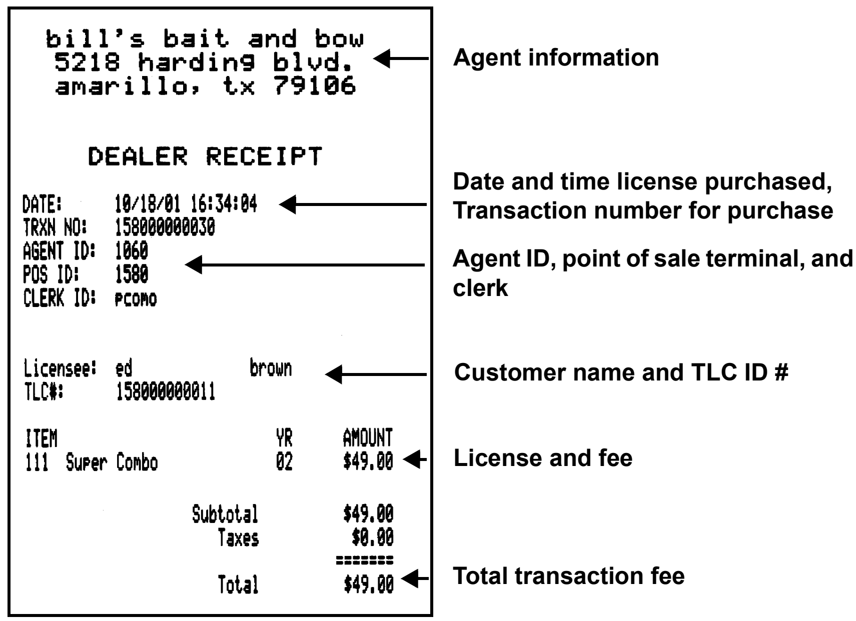
The license document is designed so that harvest tags can be separated from the body of the license by tearing on the perforations.

Attach these tags to a harvested animal or fowl by threading a tying material through the perforated hole in the tag and affixing the tag to the animal.

Dealer Receipt

The dealer receipt provides the following:

- Administrative information about the purchase
- Customer name and TLC ID #
- License purchased and fee



License Availability

The list of licenses available for purchased is dynamic.

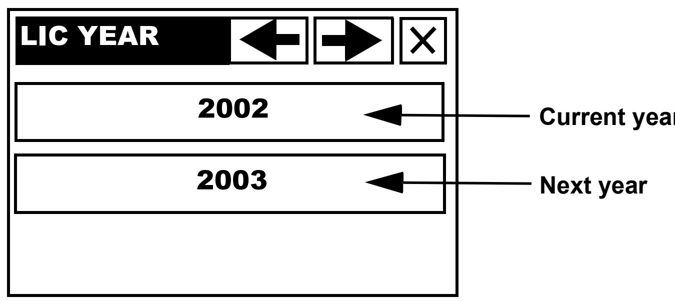
Licenses you can select for your customer from the point of sale terminal are dependent on the following:

Criteria	Explanation
Agent authorization	Not all agents can sell all licenses
Season or year	Some licenses are available for purchase only at specific times of the year. License availability also depends on which year.
Customer's current license purchases or holdings	The system keeps track of what licenses the customer already has. This determines which additional licenses can be purchased.
Customer's age	A customer's profile or personal information includes their age. Age can determine which licenses the customer can purchase and how much it will cost.
State (or country) of residence	A non-resident does not have the same purchasing options as a Texas resident. The fees for non-residents are different, also.
Other eligibility criteria	Other eligibility criteria such as license revocation. For example, if an individual has had their license privileges suspended or revoked they may be barred from purchasing a license.

Selecting the License Year

During the last few months of a current license season customers can also purchase licenses for the upcoming season.

If you are issuing a license during that time the system automatically prompts you to select the year for which the license applies.



Note: You cannot sell licenses for different years during the same license transaction

Entering Your Password

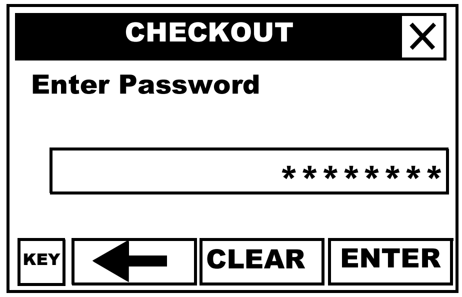
The application requires the user completing the transaction to enter their password at the end of the transaction.

Your user ID appears on the dealer receipt and is tracked in the TLC system.

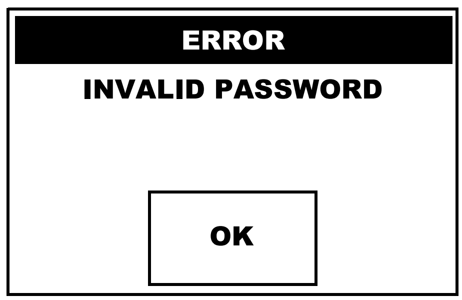
If you are not the user who was logged on when you began the transaction you need to enter your password to issue the customer's license.

Logging On to Complete the Transaction

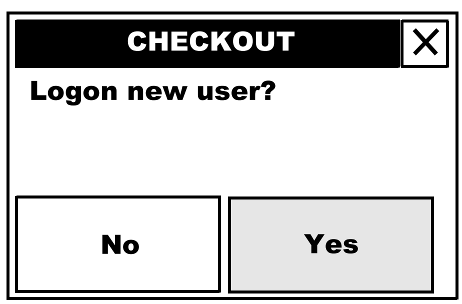
One of the last steps to printing a license is entering your password.



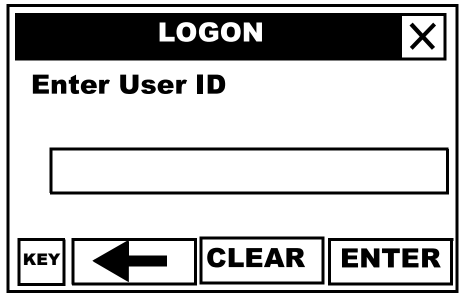
If you are not the same user who was logged on when you began the transaction the system rejects your password.



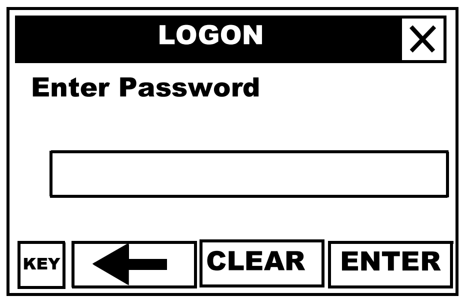
Touch **OK** or press **ENTER** to clear the message.



Touch **YES** or press **ENTER**.



Type your user ID and touch or press **ENTER**.



Type your password and touch or press **ENTER**.

If you successfully logged on the license and dealer receipt print.

Printing a License More Than Once

If a license is not aligned properly when printed you can reprint the license three more times.

An improperly aligned license is not valid.

Note these important points about reprinting a license:

- Maximum of three reprints.

  If the third reprint is unsuccessful and you request another reprint the application automatically voids the transaction.

  All information associated with that transaction is also voided.

  To re-issue the license go back to the SALES screen, retrieve the customer and start over.

- Treat a reprinted license like a voided license

  Return the reprinted license to TPW within the specified time period, currently set at 45 days.

  The system tracks and audits both reprinted and voided licenses.

Practice Exercise

In this exercise you will:

- Add the customer from Lesson 5 to the database
- Issue a Resident Fishing license
- Enter a different password from the password entered at the beginning of the exercise
- Print an additional license

Add Your Customer to the Database

1. Logon using the Clerk ID and password.
2. Bypass training mode.
3. Touch **SALES** on the MAIN menu.
4. Touch **ID CUST** on the SALES menu.
5. Touch **NEW CUST** on the ID TYPE menu.
6. Type customer information from your customer in Lesson 5, following the prompts as they appear.

   When finished the LIC TYPES screen appears.

Select the License

1. Touch **FISHING LICENSES** on the LIC TYPES menu.
2. Touch the **FORWARD** arrow on the LIC TYPES screen.
3. Touch **211 SALTWATER FISH** on the SELECT LIC screen.
4. Touch the **BACK** arrow on the LIC TYPES screen to return to the SALES menu.

Review the Selected License and Fees

1. Touch **REVIEW** on the SALES menu.
2. Touch **DETAIL** on the REVIEW screen to view the selected license and fees.
3. Touch **DONE** on the REVIEW screen or press **ENTER** to continue to the CHECKOUT screen.

Verify the Purchase

1. Review the fees on the CHECKOUT screen.
2. Touch **ACCEPT** on the CHECKOUT screen or press **ENTER** to continue to the TENDER screen.

Indicate Method of Payment

1. Touch **CHECK** on the TENDER screen.
2. Type a check number, such as 2689.
3. Touch or press **ENTER**.

Type Your Password

1. Type the Supervisor's password.
2. Touch **OK** or press **ENTER** to clear the invalid password message.
3. Touch **YES** or press **ENTER** to log on as a new user.
4. Type the Clerk's user ID and touch or press **ENTER**.
5. Type the Clerk's password and touch or press **ENTER**.

   The license and dealer receipt print.

Check Alignment of the Printed License

(In this practice, to show how to request a license reprint, imagine that the license was not aligned properly.)

1. Touch **NO** on the PRINTER ACCEPTANCE screen or press **ESC[CAPE]** to reprint the license.

   The license reprints.

2. Touch **YES** on the printer acceptance screen or press **ENTER** to accept the reprinted license.

   The application returns to the MAIN menu.

Stop Here

Lesson 7

Issuing Multiple Licenses

Lesson Objectives

When you finish this lesson you should be able to:

- Select multiple licenses and license items for a customer
- Gather additional license-related information, such as a HIP survey and ancillary data
- Remove a license after selecting it
- Print the license documents for the licenses selected and the dealer receipt

Lesson Overview

After you gather the customer's information you are ready to issue licenses.

In this lesson we will show you how to select more than one license or license item, gather license-related information from the customer, remove a license from those selected, and print the license documents and dealer receipt.

Overview of Steps to Issuing License

Each time you issue a license you will follow this same procedure:

Step	Action
Step 1	Retrieve or add your customer.
Step 2	Select the licenses and license-related items If necessary: • Complete a HIP survey for the customer • Enter any ancillary data required
Step 3	Review selected license and fees
Step 4	Verify the purchase (checkout)
Step 5	Indicate customer's method of payment
Step 6	Type your password
Step 7	Verify printed license document is properly aligned.
Step 8	• Verify with customer that all personal and license-related information on the license document is accurate • Have customer sign back of license

Steps to Issuing Multiple Licenses and Items

To Demonstrate - Issuing Multiple Licenses

The demonstration follows the steps outlined above.

Step 1: Retrieve or Add the Customer

Step 1

Log on (if necessary).

Step 2

Bypass training mode.

Step 3

Touch **SALES** on the MAIN menu.

Step 4

Touch **ID CUST** on the SALES menu.

Step 5

Select a search parameter on the ID TYPE menu and initiate search.

Step 6

Touch **DONE** on the CONFIRM screen or press **ENTER** to confirm the retrieved customer.

Step 2: Select the Licenses - Fishing License

Step 1

Select **FISHING LICENSES** from the LIC TYPES menu.

Step 2

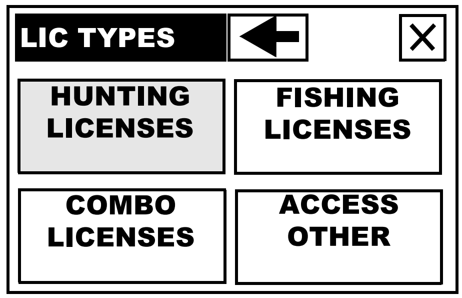
Touch the **FORWARD** arrow to search for the Fresh Water Trout stamp and select it.

The application returns to the LIC TYPES menu.

Step 2: Select the Licenses - Hunting License and HIP Survey

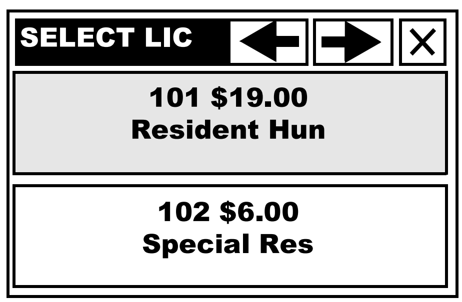
Step 1

Select **HUNTING LICENSE** category from the LIC TYPES menu.



Step 2

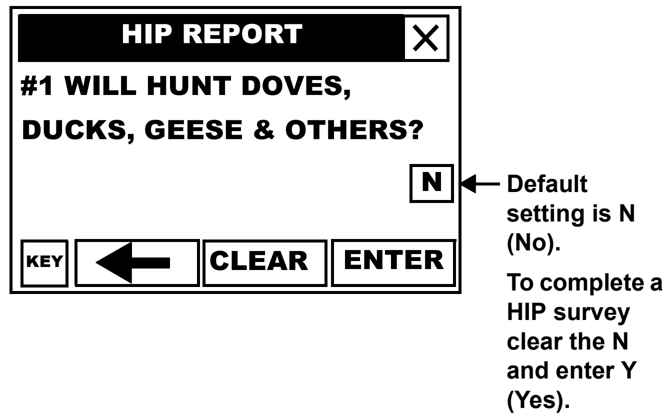
Select **101 RESIDENT HUNTING** from the SELECT LIC menu.



The first screen of the HIP survey appears.

Step 3

The first of several HIP survey questions appear.



To complete HIP certification touch **CLEAR** or press **DEL[ETE]** to remove the **N**, then type **Y**.

Type the customer's responses for the following HIP survey questions:

- Will hunt doves, ducks, geese & others?
- Ducks bagged in TX last season?
- Geese bagged in TX last season?
- Doves bagged in TX last season?
- Hunt Coots or Snipe in TX last season?
- Hunt Gallinules/Rails in TX last year?
- Hunt Woodcock in TX last season?

After answering the last HIP survey question the application returns to the LIC TYPES menu.

Step 2: Select the Licenses - License-related Items and Ancillary Data

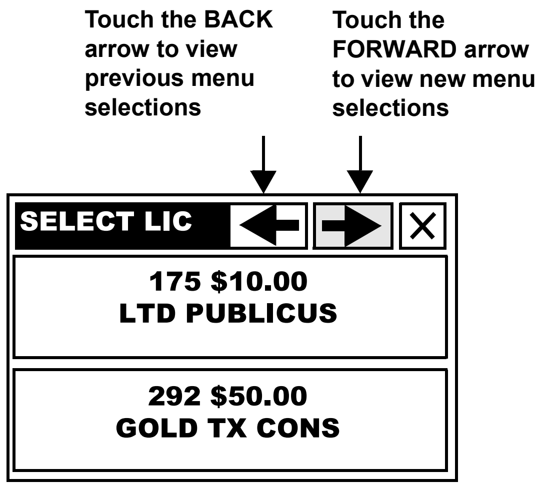
Step 1

Touch **ACCESS OTHER** on the LIC TYPES menu.

The menu selections for Access Other appear.

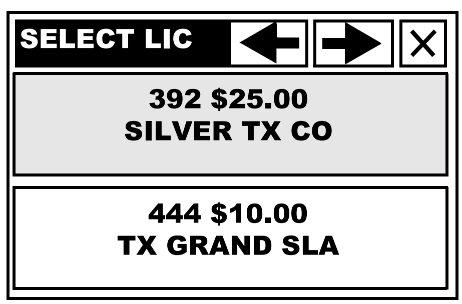
Step 2

Touch the **FORWARD** arrow on the first SELECT LIC screen.



Step 3

Touch **SILVER TX CO** (Silver Texas Conservation Passport).



The first of several ancillary data screens appear.

Step 4

Type the customer’s responses for the following ancillary data questions:

- Vehicle Make
- Model
- Model Year

- License Plate No.
- VIN No.
- Home Based City

After answering the last ancillary data question the application returns to the LIC TYPES menu.

Step 5

Touch the **BACK** arrow to return to the SALES menu. Then touch **REVIEW**.

Step 3: Review Selected Licenses, License-related Items and Fees

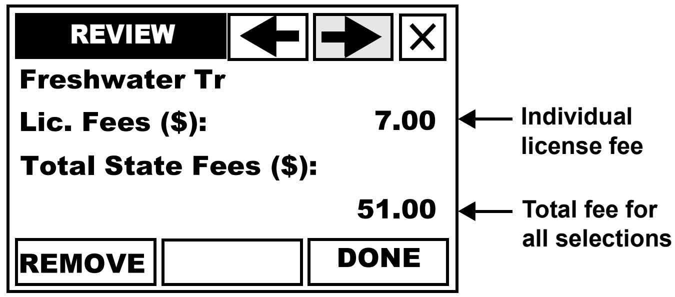
Step 1

The REVIEW screen appears showing the number of items the customer plans to purchase.

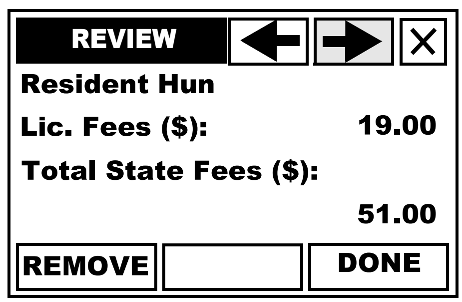
Touch **DETAIL** to review each of the license selections and fees.

Step 2

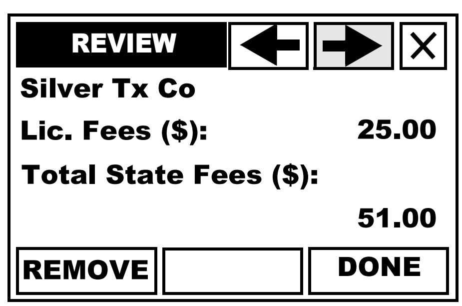
Review the Freshwater Trout stamp. Then touch the **FORWARD** arrow to continue:



Review the Resident Hunting license. Then touch the **FORWARD** arrow to continue.



Review the Silver TX Co item. Then touch the **FORWARD** arrow to continue.



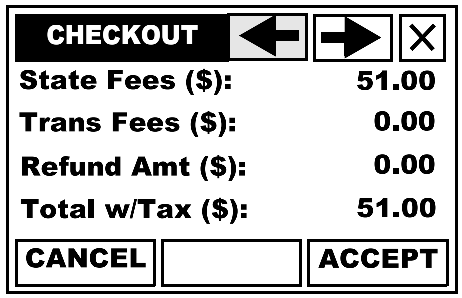
The CHECKOUT screen appears.

Step 3: Removing a License from the Review Screen

In our example the customer changes their mind about purchasing a Freshwater Trout item.

Step 1

From the CHECKOUT screen touch the **BACK** arrow to return to the first REVIEW screen.



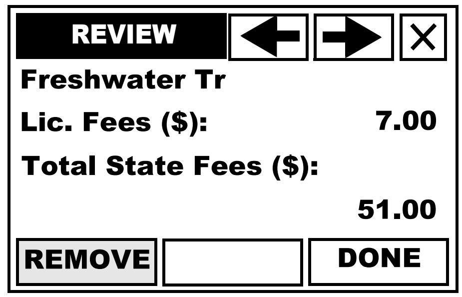
Step 2

Touch **DETAIL** on the REVIEW screen.

The Freshwater Trout item appears.

Step 3

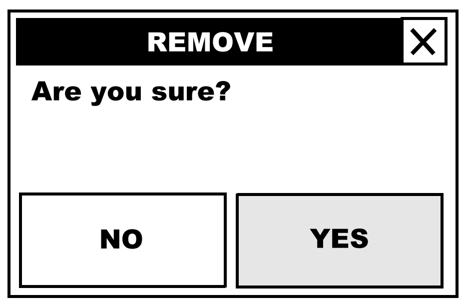
Touch **REMOVE** on the REVIEW screen.



Step 4

The application prompts you to confirm the decision.

Touch **YES** or press **ENTER**.

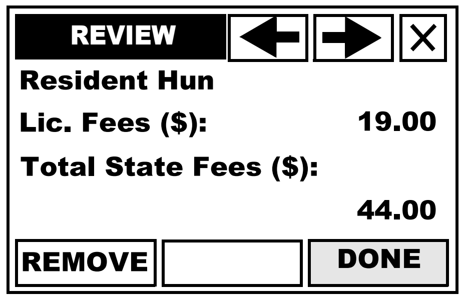


The message "Cart Updated" appears.

Step 5

The Resident Hunt license appears. Note that the total fee has been reduced.

Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.



Step 4: Verify the Purchase

Touch **ACCEPT** or press **ENTER** on the CHECKOUT screen to continue.

The TENDER screen appears.

Step 5: Indicate Method of Payment

Step 1

Touch the customer's method of payment.

Step 2

Provide additional information if prompted.

The password screen appears.

Step 6: Type Your Password

Step 1

Type your password.

Step 2

Touch or press **ENTER**.

Step 7: Check Alignment of the Printed License

Touch **YES** or press **ENTER** if the license prints correctly.

Touch **NO** or press **ESC[APE]** if the license does not print correctly.

Step 8: Verify Information on the License with Your Customer

Before giving the license to the customer:

1. Review the information on the license, making sure that you have:
   - Entered the customer's information correctly
   - Selected the license and license-related item the customer wanted to purchase
2. Point out:
   - The HIP certification on the hunting license
   - Information about acquiring a windshield decal at a state park and presenting both the pass (license document) and decal for park entry
3. Have the customer sign the back of both the license and park pass

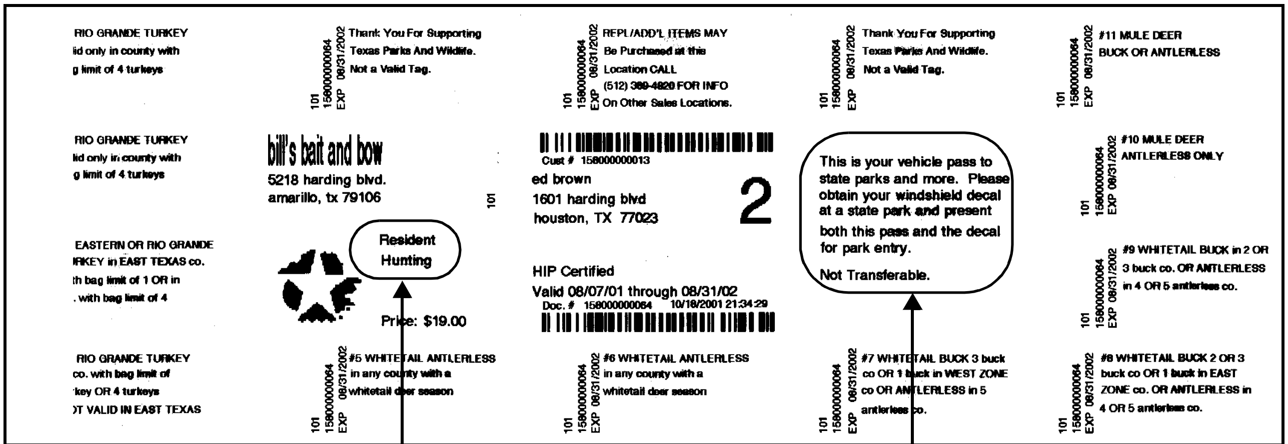
License Document and Dealer Receipt

The license documents and dealer receipt reflect the transaction in this lesson.

License Document

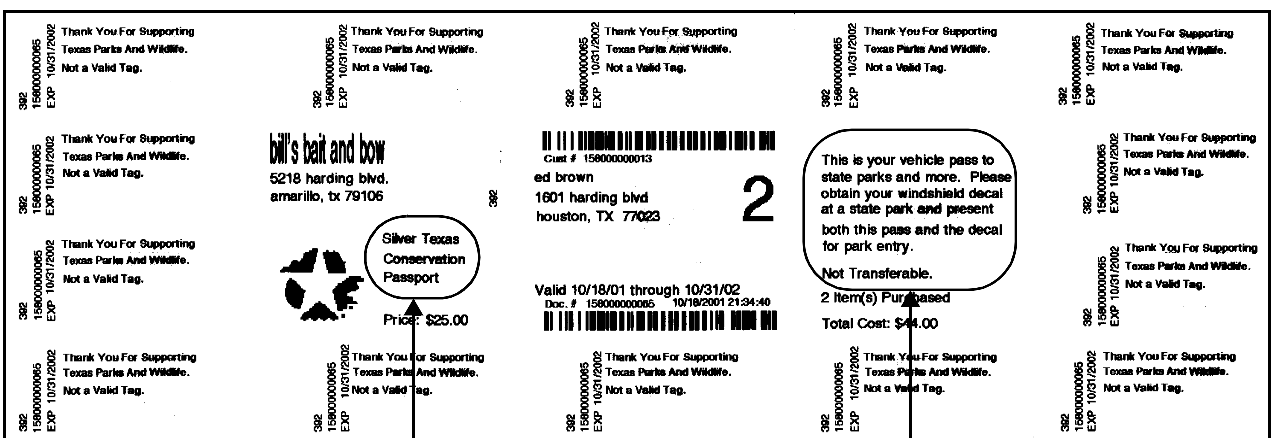
This is the license and park pass for this transaction.

Resident Hunting License



Resident Hunting License **Includes vehicle pass information**

Silver Texas Passport Item



Silver Texas Conservation Passport **Includes vehicle pass information**

Note that:

- The Resident Hunting license was issued and printed first.

  It provides the fee of the single license.

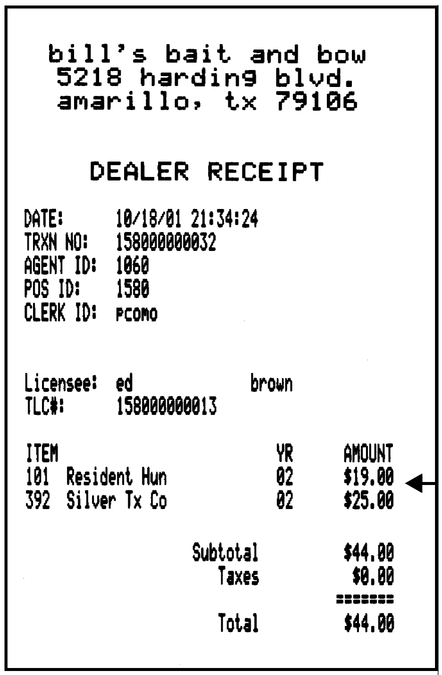
- The Silver Passport was issued and printed last.

  It provides the fee for the passport, plus the number of items purchased and the total fees for the transaction.

The last license or license-related item always includes the total number of items purchased and total fees for the transaction.

Dealer Receipt

For this transaction the dealer receipt lists both the resident hunting license and the conservation passport.


bill's bait and bow
5218 harding blvd.
amarillo, tx 79106

DEALER RECEIPT

DATE: 10/18/01 21:34:24
TRXN NO: 158000000032
AGENT ID: 1060
POS ID: 1580
CLERK ID: PCOMO

Licensee: ed brown
TLC#: 158000000013

ITEM	YR	AMOUNT
101 Resident Hun	02	$19.00
392 Silver Tx Co	02	$25.00

Subtotal $44.00
Taxes $0.00
=======
Total $44.00

Both items listed individually with total at the bottom

> **Note: Remember that the receipt printed from the Hypercom unit is your receipt. Do not give it to the customer.**

Completing the HIP Survey

HIP survey questions appear if the customer is purchasing a hunting license and has not been HIP-certified for the current license year.

If a customer declines to complete a survey when purchasing a license, if and when that customer purchases another hunting license during the year, the survey questions re-appear.

Touching or pressing Enter without changing the N (No) to a Y (Yes) instructs the application to bypass all of the remaining HIP survey questions.

Ancillary Data

Ancillary data covers a variety of license and license-related item selections.

For the example used in this lesson the ancillary data prompts were used to designate the vehicle the customer wanted assigned to the conservation passport.

Other selections requiring ancillary data will generate different on-screen prompts.

Enter the customer's responses to these prompts.

Practice Exercise

In this exercise you will:

- Retrieve the customer you added in Lesson 5 using the bar code scanner
- Issue multiple licenses to the customer
- Complete a HIP survey
- Complete questions for ancillary data
- Remove a license from those selected

Retrieve the Customer from the Database

1. Log on using the Clerk ID and password.
2. Bypass training mode.

3. Touch **SALES** on the MAIN menu.
4. Touch **ID CUST** on the SALES menu.
5. Scan either the Cust # or Doc # on the customer's license to retrieve the customer.
6. Touch **DONE** on the CONFIRM screen or press **ENTER**.

   The LIC TYPES screen appears.

Select the First License

1. Touch **FISHING LICENSES** on the LIC TYPES menu.
2. Touch the **FORWARD** arrow to select a fishing license (other than the Bonus Red Drum) from the SELECT LIC screen.

   The LIC TYPES screen appears.

Select the Second License

1. Touch **HUNTING LICENSES** on the LIC TYPES menu.
2. Touch **101 RESIDENTIAL HUNTING** from the SELECT LIC screen.
3. Type information in response to the HIP survey prompts.

   The LIC TYPES screen appears when finished.

Select the Third License (License-related item)

1. Touch **ACCESS OTHER** on the SALES menu.
2. Touch **292 GOLD TX CONS** (Gold Texas Conservation Passport).
3. Type information in response to the ancillary data prompts.

   The LIC TYPES screen appears when finished.
4. Touch the **BACK** arrow on the LIC TYPES screen.

Review the Selected Licenses and Fees and Remove a License

1. Touch **REVIEW** on the SALES menu.

2. Touch **DETAIL** on the REVIEW screen to view the selected licenses, license-related item, and fees.

   The first license detail is the fishing license.

3. Touch **REMOVE**.

4. Touch **YES** or press **ENTER** to confirm your decision.

   The message "Cart Updated" appears.

5. Touch the **FORWARD** arrow to review the other selections.

   After viewing the last selection the CHECKOUT screen appears.

Verify the Purchases

1. Review the fees on the CHECKOUT screen.

2. Touch **ACCEPT** on the CHECKOUT screen or press **ENTER** to continue to the TENDER screen.

Indicate Method of Payment

Touch **CASH** to continue.

Type Your Password

1. Type the Clerk's password.

2. Touch or press **ENTER.**

Check Alignment of the Licenses

1. If the first license aligned properly:

   Touch **YES** or press **ENTER**.

   The second license automatically prints.

   (If the license printed correctly you can bypass Step 2 and continue to Step 3.)

2. If the license did not align properly:

   Touch **NO** or press **ESC[APE]** to reprint the first license.

   Continue until the license prints correctly or you have tried to reprint the license three times.

If you instruct the application to reprint more than three times the transaction is voided.

3. Touch **YES** or press **ENTER** if the second license aligned properly.

The MAIN menu appears.

Stop Here

Unit V
Other Licensing Tasks

Lesson 8

Voiding a License

Lesson Objectives

When you finish this lesson you should be able to:

- Void a previously purchased license

Lesson Overview

Sometimes a customer may change their mind and decide to cancel a previously purchased license. The point of sale terminal provides a way to do this, however, restrictions apply.

In this lesson we will show you how to void a license and describe the restrictions and requirements associated with this process.

Overview of Steps to Void a License

Each time you void a license you will follow the same procedure:

Step	Action
Step 1	Retrieve the license to void
Step 2	Indicate additional licenses to void
Step 3	Void Authorization • Bypass authorization screen in first 48 hours after license purchased • Enter TPW authorization number after the first 48 hours
Step 4	Review license to be voided
Step 5	Verify the void transaction (checkout)
Step 6	Indicate customer's method of payment
Step 7	Type your password
Step 8	Acknowledge prompt to collect license from customer
Step 9	Complete transaction or start a new transaction

Steps to Voiding a License

To Demonstrate - Voiding a License

The demonstration follows the steps outlined above.

Step 1: Retrieve the License to Void

Step 1

Log on (if necessary)

Step 2

Bypass training mode.

Step 3

Touch **SALES** on the MAIN menu.

Step 4

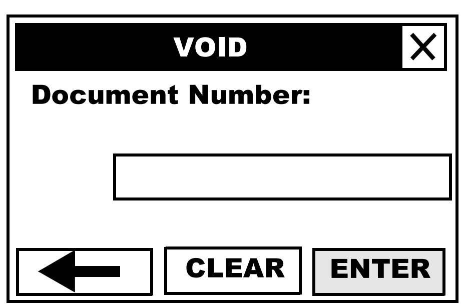
Touch **MORE** on the first SALES menu.

Step 5

Touch **VOID** on the second SALES menu.

Step 6

Use the bar code scanner to scan the Doc # on the license, or key in the Doc # and touch or press **ENTER**.



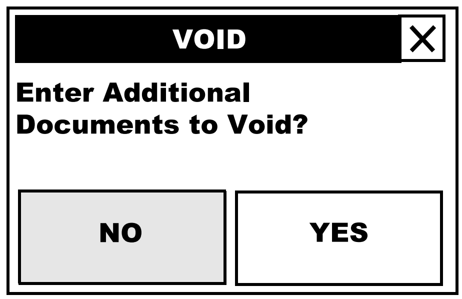
Step 2: Indicate the Number of Licenses to Void

Step 1

Touch **YES** or press **ENTER** if the customer wants to void additional licenses. Then scan or key in the Doc # for any additional licenses.

In this example, our customer wants to void only one license.

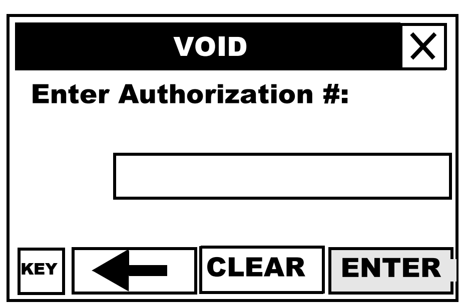
Touch **NO** or press **ESC[APE]**.



Step 3: Complete Void Authorization

Within 48 hours of purchase:	Touch or press **ENTER** to continue to the REVIEW screen.
48 hours after purchase:	• Type the TPW authorization number • Touch or press **ENTER** to continue to the REVIEW screen.

In our example the customer is voiding the license within 48 hours of purchase.



Note: Period before an authorization number is required is set by TPW and subject to change. Currently it is set at 48 hours.

Step 4: Review the License to be Voided

Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.

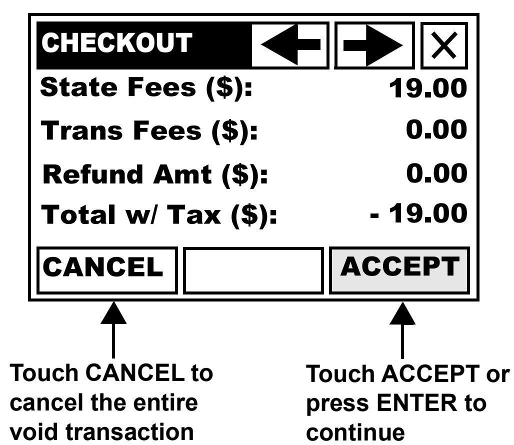
Step 5: Verify the Void Transaction (Checkout)

Step 1

Review refund amount with customer.

Step 2

Touch **ACCEPT** or press **ENTER** to continue to the TENDER screen.



Step 6: Indicate Customer's Method of Payment

In this example, the customer purchased the license with cash.

Step 7: Type Your Password

Step 1

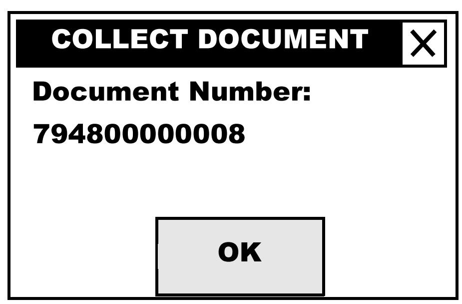
Type your password.

Step 2

Touch or press **ENTER**.

Step 8: Acknowledge Prompt to Collect License

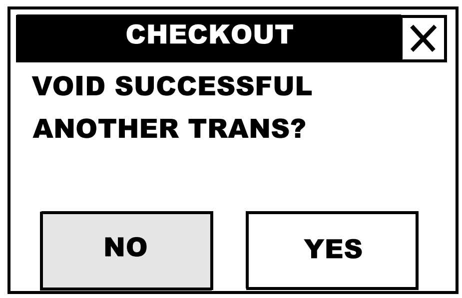
Touch **OK** or press **ENTER** to clear the prompt reminding you to collect the license you are voiding.



Step 9: Complete Transaction/Start a New Transaction

Touch **NO** or press **ESC[APE]** to finalize the transaction.

Touch **YES** or press **ENTER** if the customer wants to purchase or replace another license.



The application returns to the MAIN menu.

Restrictions and Requirements for Voiding a License

The following restrictions and requirements apply if a customer asks you to void a license.

Location	Agents can only void licenses purchased at their location.

Time Period	Authorization conditions:
	• Within the first 48 hours following a purchase agents can void a license without an authorization number from TPW
	• After the first 48 hours the agent must call a TPW office and receive an authorization number
	    • Authorization numbers are issued at the discretion of TPW office
	    • If office does not issue an authorization number the customer must arrange with TPW office to void license
	• Time period to void without authorization currently set at 48 hours.
	    • Time period set by TPW and subject to change.

Related Items	All dependent items, such as tags, are also voided
Collect and Return	Agent must collect the voided license and return it to TPW within the specified time period, currently set at 45 days, of the void transaction. Failure to do so may result in chargeback amounts being swept from your account even though you refunded the customer’s money.
On-Line Only	You cannot void a license if your terminal is off-line

> **Note: Treat licenses reprinted because of misalignment as voided licenses.**
>
> **Return a reprinted license to TPW within the specified time period, currently set at 45 days.**

Sequence for Voiding a License

Note the following before voiding a license:

You...	If...
Cannot void a license...	You have begun a license or replacement transaction. You must complete the purchase first then return to the SALES menu and select **VOID** to begin the void transaction.
Can void a license...	You begin with the void process. After completing the void transaction you can issue or replace a license without retrieving the customer first.

Practice Exercise

In this exercise you will:

- Retrieve a license document from the database using the bar code scanner
- Void the license

Retrieve the License to Void

1. Log on using the Clerk ID and password.

2. Bypass training mode.
3. Touch **SALES** on the MAIN menu.
4. Touch **MORE** on the first SALES menu.
5. Touch **VOID** on the second SALES menu.
6. Scan the Doc # on the fishing license from Lesson 6.

Indicate the Number of Licenses to Void

Touch **NO** or press **ESC[CAPE]** - only one license will be voided in this exercise.

Void Authorization

Touch or press **ENTER** - void transaction is within the 48 hour time period.

Review License to be Voided

Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.

Verify the Void Transaction (Checkout)

Touch **ACCEPT** or press **ENTER** to continue to the TENDER screen.

Indicate Customer's Method of Payment

Touch **DEBIT CARD** to continue to the Password screen.

Type Password

1. Type the Clerk's password.
2. Touch or press **ENTER**.

Acknowledge Prompt to Collect License

Touch **OK** or press **ENTER** to clear message.

Complete Transaction/Start a New Transaction

Touch **NO** or press **ESC[APE]** to complete the void transaction.

Stop Here

Lesson 9

Replacing a License

Lesson Objectives

When you finish this lesson you should be able to:

- Issue a replacement license

Lesson Overview

Sometimes licenses are either lost or destroyed and the customer needs a replacement. You can issue replacement licenses from the point of sale terminal

In this lesson we will show you how to issue a replacement license and describe the restrictions and requirements associated with this process.

Overview of Steps to Replace a License

Each time you replace a license you will follow the same procedure:

Step	Action
Step 1	Retrieve the customer from the database
Step 2	Select the license to replace
Step 3	Indicate which tags the customer has used already (if prompted)
Step 4	Review license to be replaced
Step 5	Verify the replacement transaction and fees (checkout)
Step 6	Indicate customer's method of payment
Step 7	Type your password
Step 8	Acknowledge prompt to have customer complete Replacement Form 341
Step 9	Check alignment of the printed license
Step 10	• Verify with customer that all personal and license-related information on the license document is accurate • Have customer sign back of license

Steps to Replace a License

To Demonstrate - Replacing a License

The demonstration follows the steps outlined above.

Step 1: Retrieve the Customer from the Database

Step 1

Log on (if necessary)

Step 2

Bypass training mode.

Step 3

Touch **SALES** on the MAIN menu.

Step 4

Touch **ID CUST** on the SALES menu.

Step 5

Select a search parameter on the ID TYPE menu and initiate search.

Step 6

Touch **DONE** on the CONFIRM screen or press **ENTER** to confirm the retrieved customer.

Step 7

Touch the **BACK** arrow on the LIC TYPES screen to return to the SALES screen.

Step 2: Select the License to Replace

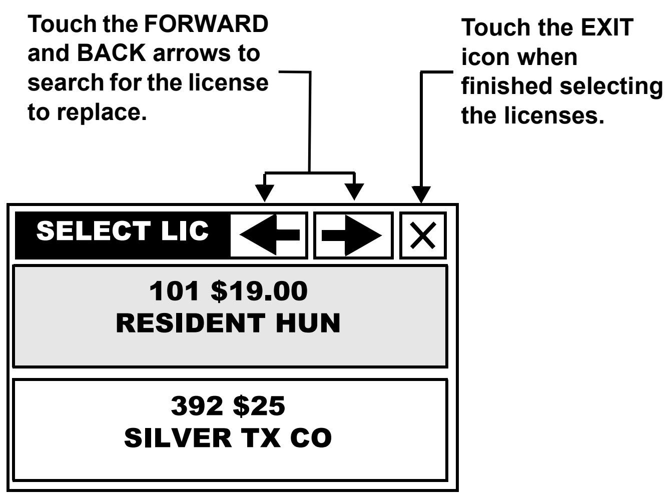
Step 1

Touch **MORE** on the first SALES screen.

Step 2

Touch **REPLACE** on the second SALES screen.

The licenses available for replacement appear in the SELECT LIC screen.



Step 3

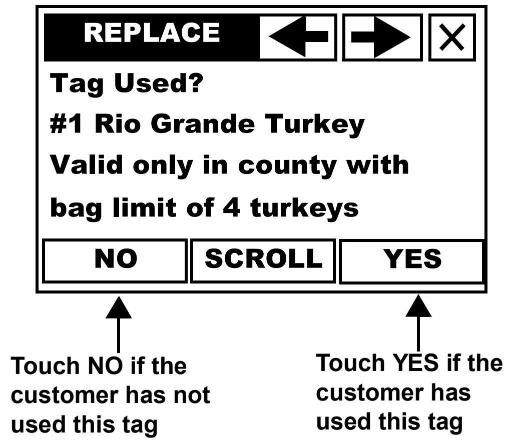
Touch **101 RESIDENT HUN** as the license to replace.

Step 3: Indicate Which Tags Have Been Used

Step 1

Touch either **YES** or **NO**, based on the customer's response to the tag-related prompts.

Tags not yet used are included on the replacement license.

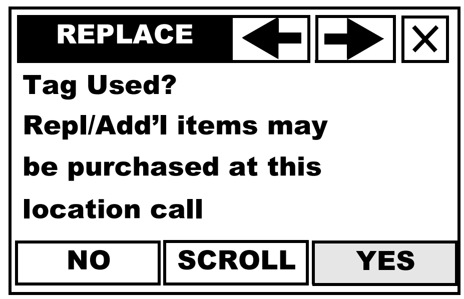


For the Resident Hunt license the following prompts appear:

- Tag Used? #1 Rio Grande turkey valid only in county with bag limit of 4 turkeys
- Tag Used? #2 (Text of prompt the same as #1)
- Tag Used? #3 Eastern or Rio Grande turkey in east Texas co. with bag limit of 1 or
- Tag Used? #4 Rio Grande turkey in co. with bag limit turkey or 4 turkeys. Not valid in east Texas
- Tag Used? #5 Whitetail anterlerless in any county with a whitetail deer season
- Tag Used? #6 (Text of prompt the same as #5)
- Tag Used? #7 Whitetail buck 3 buck co. or 1 buck in west Z co. or anterless in 5 anterless co.
- Tag Used? #8 Whitetail buck 2 or buck co. or 1 buck in E zone co. or antlerless 4 or 5 anterless co.
- Tag Used? #9 Whitetail buck in 2 3 buck co. or antlerless in 4 o4 5 antlerless co.
- Tag Used? #10 Mule deer antlerless only
- Tag Used? #11 Mule deer Buck or antlerless

Step 2

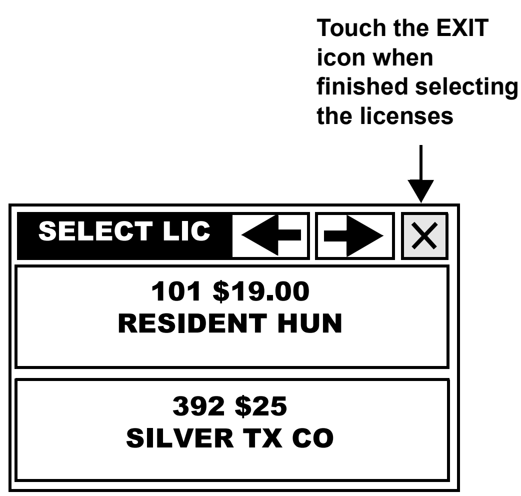
This is the final prompt after responding to the tag questions. Touch **YES** or press **ENTER** to continue.



The application returns to the SELECT LIC screen for more selections.

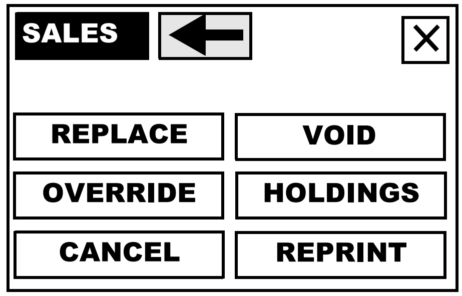
Step 3

Touch the **EXIT** icon on the SELECT LIC screen to return to the second SALES screen.



Step 4

Touch the **BACK** arrow to return to the first SALES screen.



Step 5

Touch **REVIEW** on the first SALES screen.

Step 4: Review the License to be Replaced

Step 1

Review the number of items in the cart to make sure the correct number of licenses were selected for replacement.

In this example, one license was selected.

Step 2

Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.

Step 5: Verify the Replacement Transaction and Fees

Step 1

Review, with the customer, the fee for replacing the selected license.

Step 2

Touch **ACCEPT** or press **ENTER** to continue to the TENDER screen.

Step 6: Indicate the Customer's Method of Payment

Touch **CASH** as the customer's method of payment for the replacement fee.

Step 7: Type Your Password

Step 1

Type your password.

Step 2

Touch or press **ENTER**.

Step 8: Acknowledge the Customer's Completion of Replacement Form 341

Step 1

Remind customer to complete TPW Replacement Form 341.

Step 2

Touch **OK** or press **ENTER** to clear message.

Step 9: Check Alignment of the Printed License

Touch **YES** or press **ENTER** if the license prints correctly.

Touch **NO** or press **ESC[APE**] if the license did not print correctly.

Step 10: Verify Information on the License with Your Customer

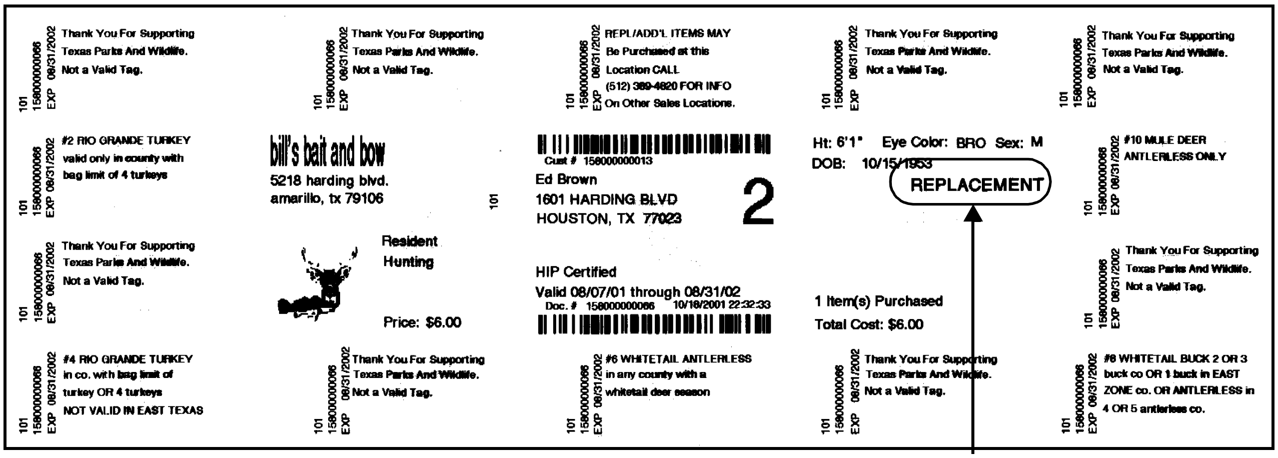
Before giving the license to your customer:

- Review the license with your customer to make sure you have selected the correct license for replacement
- Have the customer sign the back of the replacement license

License Document and Dealer Receipt

For a replacement license single license and receipt is generated.

License Document



REPLACEMENT marked clearly on the license

Dealer Receipt

The dealer receipt indicates the fee for replacing the license.

```
bill's bait and bow
5218 harding blvd.
amarillo, tx 79106

DEALER RECEIPT

DATE:      10/18/01 22:32:29
TRXN NO:   158000000033
AGENT ID:  1060
POS ID:    1580
CLERK ID:  PCOMO

Licensee:  Ed          Brown
TLC#:      158000000013

ITEM                     YR   AMOUNT
101  Resident Hun        02    $6.00

              Subtotal         $6.00
                 Taxes         $0.00
                             =======
                 Total         $6.00
```

Fee for replacing license

Restrictions and Requirements for Replacing a License

The following restrictions and requirements apply if a customer asks you to replace a license.

Allowable Licenses	Only licenses allowed to be replaced, according to TPW regulations, are displayed
Fee	Some licenses have a replacement fee, which the customer must pay
Marked	Replacement licenses will be clearly marked as such
Signed Statement	Customer must complete and sign TPW's Replacement Form 341.

Practice Exercise

In this exercise you will:

- Select a license to replace
- Identify tags not yet used by the customer
- Print the replacement license

Retrieve the Customer from the Database

1. Log on using the Clerk user ID and password.
2. Bypass training mode.
3. Touch **SALES** on the MAIN menu
4. Touch **ID CUST** on the SALES menu.

5. Retrieve the customer from Lesson 8 using one of the following methods:
   - Bar code scanner
   - Search parameters using the keyboard
6. Touch **DONE** on the CONFIRM screen or press **ENTER**.

   The LIC TYPES screen appears.

Select the License to Replace

1. Touch the **BACK** arrow on the LIC TYPES screen.
2. Touch **MORE** on the first SALES menu.
3. Touch **REPLACE** on the second SALES menu.

   The SELECT LIC screen appears.
4. Touch the **101 RESIDENT HUN** license.
5. Complete the tag prompts - answer yes for some and no for others:

   Touch **YES** or press **ENTER** for a used tag.

   Touch **NO** or press **ESC[APE]** for an unused tag.

   When finished the SELECT LIC screen appears.
6. Touch the **EXIT** icon on the SELECT LIC screen to return to the second SALES screen.
7. Touch the **BACK** arrow on the second SALES screen to return to the first SALES screen.

Review the License to be Replaced

1. Touch **REVIEW** on the SALES menu.
2. Verify that the number of licenses selected for replacement is accurate.

   In this exercise there should be one item in the cart.
3. Touch **DONE** or press **ENTER** to continue to the CHECKOUT screen.

Verify the Replacement Transaction and Fee

1. Verify the replacement fee.
2. Touch **ACCEPT** or press **ENTER** to continue to the TENDER screen.

Indicate Customer's Method of Payment

1. Touch either **CREDIT CARD** or **CHECK**.
2. Respond to the prompt, as appropriate, then touch or press **ENTER** to continue to the password screen.

Type Your Password

1. Type the Clerk's password.
2. Touch or press **ENTER**.

Acknowledge the Prompt for Form 341

Touch **OK** or press **ENTER** to clear the message reminding you to have the customer complete Replacement Form 341.

Check Alignment of the Printed License

Touch **YES** or press **ENTER** if the license aligned correctly.

Touch **NO** or press **ESC[APE]** to reprint the license if it did not align correctly.

Stop Here

Lesson 10

Additional Licensing Activities

Lesson Objectives

When you finish this lesson you should be able to use the following features found on the second SALES screen:

- Issue licenses using the override feature
- Cancel a license transaction
- View the licenses and license-related items held by a customer
- Reprint the dealer receipt

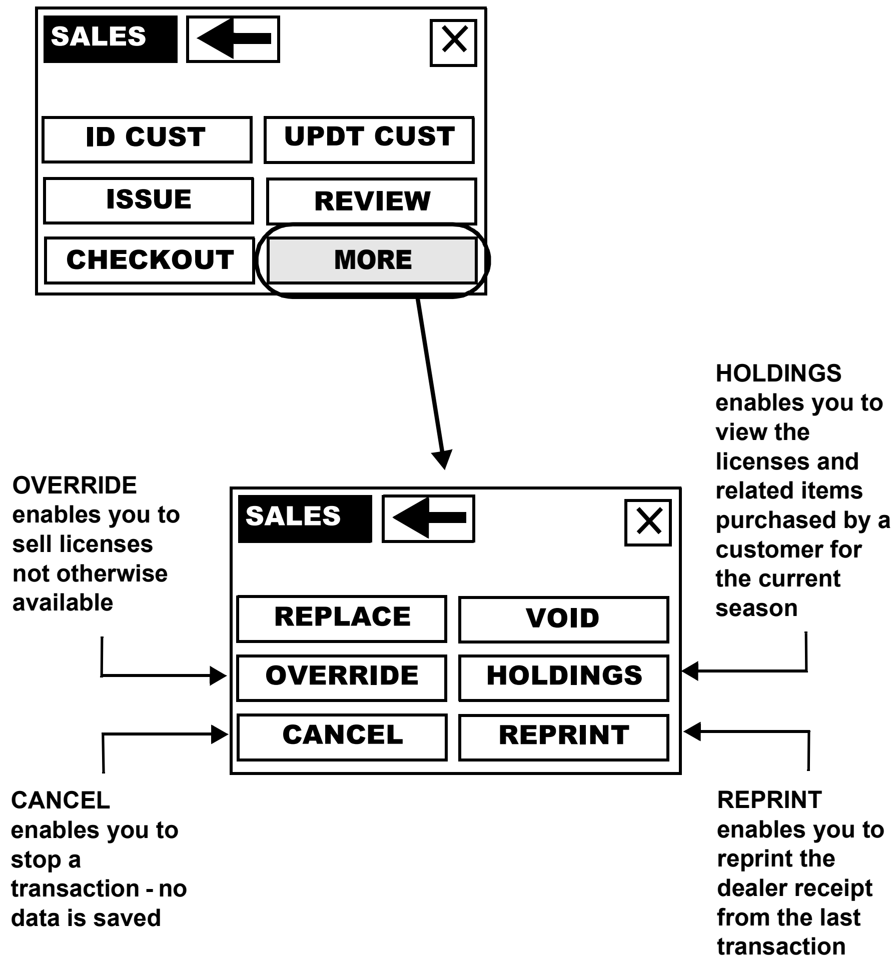
Lesson Overview

On the second SALES screen are several additional features related to licensing activity that have not been covered.

In this lesson we will show you how to access these features and explain the purpose of each.

Features on the Second Sales Screen

When you touch **MORE** on the first SALES screen you have several more options, in addition to replace and void, to chose from.



Accessing Additional Features

To Demonstrate - Accessing the Override Feature

This demonstration shows you how to access the Override feature to issue licenses that may not be available to a customer otherwise.

Retrieve the Customer from the Database

Step 1

Log on (if necessary)

Step 2

Bypass training mode.

Step 3

Touch **SALES** on the MAIN menu.

Step 4

Touch **ID CUST** on the SALES menu.

Step 5

Select a search parameter on the ID TYPE screen or use the bar code scanner on a license document and initiate the search.

Step 6

Touch **DONE** on the CONFIRM screen or press **ENTER.**

The LIC TYPES screen appears.

View Licenses Currently Available to Purchase

Step 1

Touch **HUNTING LICENSES** to view the licenses currently available for purchase.

Note that Resident Hunt and Special Resident Hunt do not appear because they were purchased in an earlier lesson.

Step 2

Touch the **EXIT** icon to return to the LIC TYPES menu.

Step 3

Touch the **BACK** arrow to return to the SALES menu.

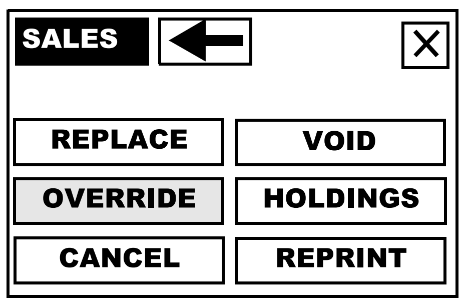
Select Override to Issue a License Not Available

Step 1

Touch **MORE** on the first SALES menu.

Step 2

Touch **OVERRIDE** on the second SALES menu.



The LIC TYPES screen appears.

Step 3

Touch **HUNTING LICENSES.**

Note that both the Resident Hunt and Special Resident Hunt licenses are now available.

You can select the license to issue from this screen and complete the transaction as a typical license purchase.

Note: Use your discretion when to use the Override feature when issuing licenses.

To Demonstrate - Cancelling a Transaction

This demonstration shows how to cancel a transaction before getting to the CHECKOUT screen, which has a cancel option.

Retrieve the Customer from the Database

Retrieve the customer used in the previous demonstration.

The LIC TYPES screen appears.

Select a License

Step 1

Touch **FISHING LICENSES** and select a fishing license.

The LIC TYPES screen appears.

Step 2

Touch **HUNTING LICENSES** and select a hunting license.

The LIC TYPES screen appears.

Review the Licenses Selected

Step 1

Touch the **BACK** arrow to return to the SALES screen.

Step 2

Touch **REVIEW** on the SALES menu to continue to the REVIEW screen.

Cancelling the Transaction

Step 1

Touch the **EXIT** icon on the REVIEW screen.

The SALES screen appears.

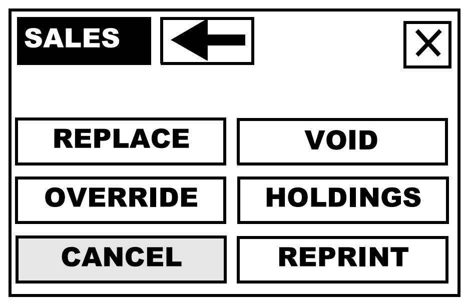
Step 2

Touch **MORE** on the SALES menu.

The second SALES screen appears.

Step 3

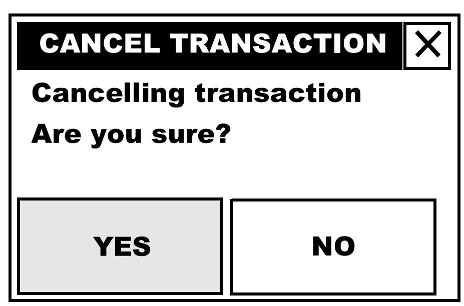
Touch **CANCEL** on the SALES menu.



The Cancel Transaction confirmation appears.

Step 4

Touch **YES** to cancel the transaction.



The transaction is cancelled.

No data is retained, including any information on updating a customer's record or adding a new customer to the database.

To Demonstrate - Viewing a Customer's Holdings

This demonstration shows how to access the Holdings feature to see what licenses and other items the customer has purchased for the current season.

Retrieve the Customer From the Database

Retrieve the customer used in the previous demonstration.

The LIC TYPES screen appears.

View the Customer's Holdings

Step 1

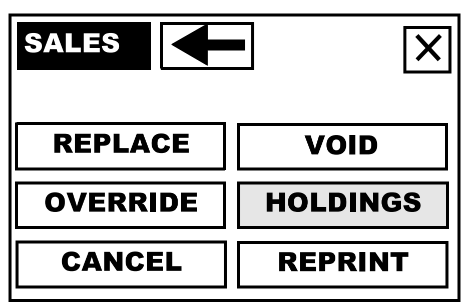
Touch the **BACK** arrow on the LIC TYPES screen to return to the first SALES screen.

Step 2

Touch **MORE** on the SALES menu.

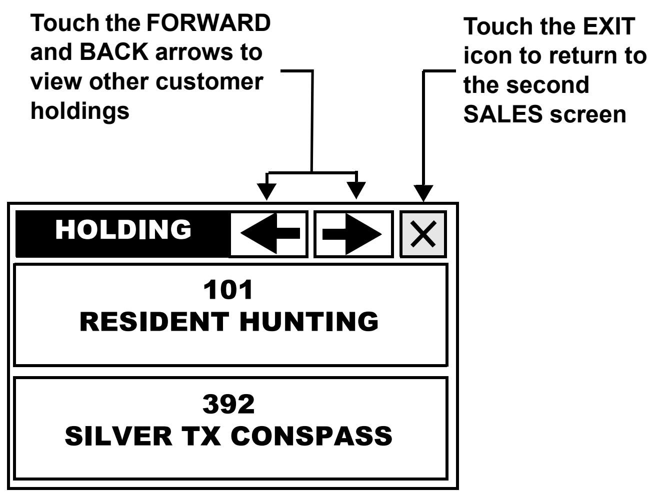
Step 3

Touch **HOLDINGS** on the second SALES menu.



Step 4

View the customer's current holdings.



Step 5

Touch the **EXIT** icon to return to the second SALES screen.

Complete View of Customer's Holdings

Touch **CANCEL** on the second SALES menu if the customer does not want to continue with a transaction such as purchasing a license or license-related item.

The MAIN menu appears.

Initiate a New Transaction

If the customer wants to continue with a transaction then follow these steps:

Step 1

Touch the **BACK** arrow to return to the first SALES screen.

Step 2

Touch **ISSUE** to begin a purchase, or touch **MORE**, then **REPLACE** to replace a license.

The customer is retained for the transaction. You do not need to retrieve the customer again.

To Demonstrate - Reprinting a Dealer Receipt

This demonstration shows how to access the Reprint feature to reprint a dealer receipt.

The application always saves and retains the last dealer receipt printed.

If, for some reason, you need to reprint the receipt you can access this feature to do so.

Access the Reprint Feature

Step 1

Touch **SALES** on the MAIN men.

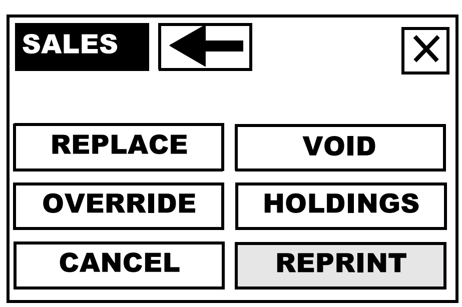
Step 2

Touch **MORE** on the SALES menu.

Step 3

Touch **REPRINT** on the second SALES menu.

A customer does not need to be identified or a transaction in progress to reprint a dealer receipt.



After the receipt reprints the application returns to the MAIN menu.

Unit VI

Terminal Tasks

Lesson 11

Changing Your Password

Lesson Objectives

When you finish this lesson you should be able to:

- Change your password

Lesson Overview

If you have been assigned either the Supervisor or Clerk role you can change your password through the point of sale terminal.

If your role is Agent Location Manager you must call the WorldCom Help Desk to change your password.

In this lesson we will explain how to change your password.

How to Change Your Password

To Demonstrate - Changing Your Password

Step 1

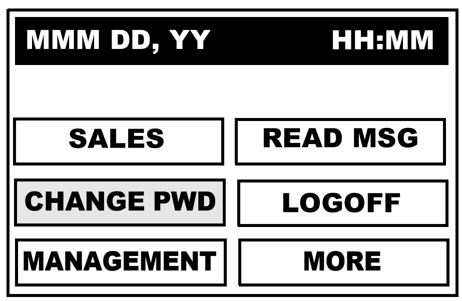
Log on (if necessary)

Step 2

Bypass training mode.

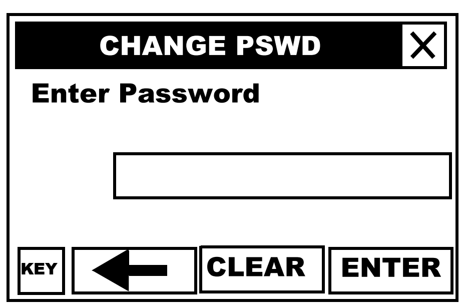
Step 3

Touch **CHANGE PWD** on the MAIN menu.



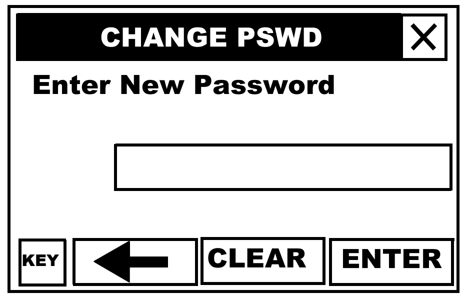
Step 4

Type current password, then touch or press **ENTER**.



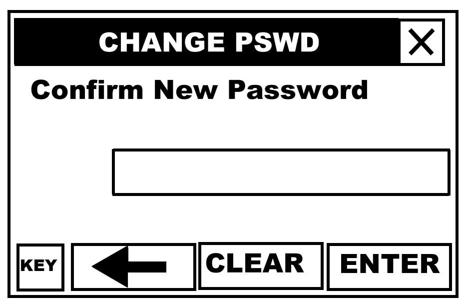
Step 5

Type new password, then touch or press **ENTER**.



Step 6

Type the new password a second time to confirm, then touch or press **ENTER**.

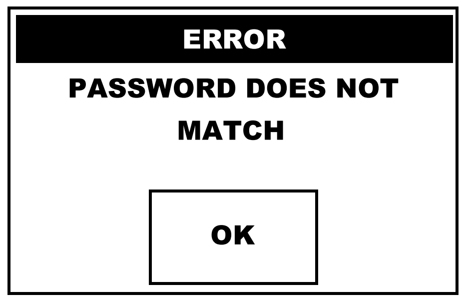


If the password is confirmed the application returns to the MAIN menu.

Entering an Invalid Password

The application matches the new password you enter against the password you entered to confirm the change.

Mismatched passwords cause the following message to appear:



Touch **OK** or press **ENTER** to clear this message.

The application starts over, prompting you to enter first your current password then your new password two times.

Password Parameters

When entering your new password you *must* adhere to the following parameters.

Minimum of 5 characters Maximum of 10 characters	Your password must have the correct number of characters. It can be any combination of alpha and numeric characters.
No sequential characters	You cannot use sequences such as 12345 or abcde.
No recurring characters	You cannot use recurring characters such as 22222 or ccccc.

Case sensitive	Your password is case sensitive. Always use the same combination of upper and lower case letters. Be sure the Caps Lock feature on your keyboard is off when you: • Enter your password to log on • Change your password

If you enter a password that violates one of these parameters the application beeps twice and remains at the screen where the violation occurred.

Change Your Password at Each Terminal

At locations with multiple terminals a user's password must be changed at each terminal.

Passwords are stored locally, on each terminal, not in the TLC database.

Changing your password at one terminal does not automatically change your password at other terminals at your location.

Practice Exercise

In this exercise you will:

- Change the Clerk's password, then reset it to the original password

Change the Clerk's Password

1. Log on using the Clerk user ID and password.
2. Touch **CHANGE PWD** on the MAIN menu.
3. Type the current Clerk password and touch or press **ENTER**.
4. Type the new password - reddrum - and touch or press **ENTER**.
5. Type the new password again and touch or press **ENTER**.

Reset the Clerk’s Password

Follow this same sequence of steps to change the Clerk’s password from "reddrum" to the original password.

Stop Here

Lesson 12

Other Activities

Lesson Objectives

When you finish this lesson you should be able to access:

- Messages sent from TPW to agents
- Log off feature
- End shift reports
- Terminal Help

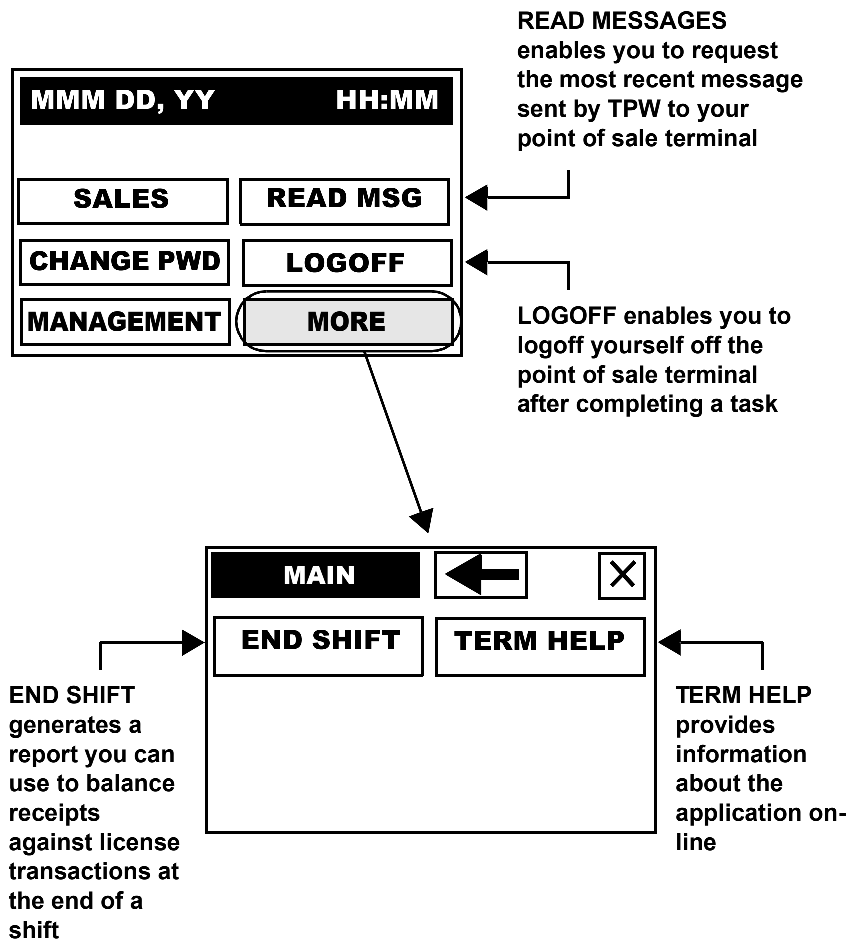
Lesson Overview

In addition to issuing, voiding, or replacing licenses, the point of sale terminal has other functions to help you conduct TPW licensing business.

In this lesson we will describe these functions and explain how to use them.

Other Activities Available on the Main Menus

These additional activities are available on both the first and second MAIN menus.



Reading Messages

To Demonstrate - Read Messages

This demonstration shows how to access messages sent by TPW to your point of sale terminal.

Step 1

Log on (if necessary)

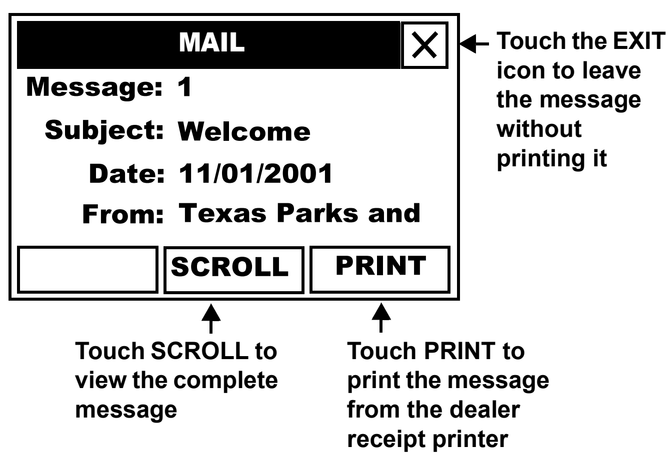
Step 2

Bypass training mode.

Step 3

Touch **READ MSG** on the SALES menu.

The most recent message sent by TPW appears.



Step 4

Options:

- Touch the **EXIT** icon to leave the message without printing it
- Touch **SCROLL** to read the entire message
- Touch **PRINT** to print the message and return to the MAIN menu

About the Read Messages Feature

These are important points to remember about the Read Messages feature:

- Messages from TPW automatically appear on the point of sale terminal display when sent.

  The only time a message does not automatically display is during a licensing transaction.

- Touch the **EXIT** icon to leave the message without printing it or touch **PRINT** to print the message.

  Both clear the message from the display and store it until another message is received.

- Other users can view the message by selecting **READ MSG** on the MAIN menu
- Only the last message received is stored by the terminal.

  When a new message is received the old message is automatically deleted.

- TPW can send messages to:
  - All agents and all point of sale terminals
  - To point of sale terminals at a specific location (under the same Agency ID)
  - To a specific point of sale terminal
- Under Management on the SALES menu are additional messaging options available to users with the appropriate privileges

No Message Available

If a mail message is not stored on the terminal when you touch **READ MSG** the application displays the message:

NO MESSAGE AVAILABLE

Logging Off

To Demonstrate - Log off

This demonstration shows how to log yourself off the point of sale terminal.

Step 1

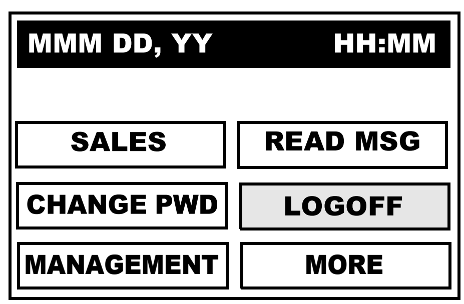
Log on to demonstrate the log off process.

Step 2

Bypass training mode.

Step 3

Touch **LOGOFF**.



The USER ID LOGON screen appears.

Your logoff was successful.

About the Logoff Feature

These are important points to remember about the Logoff feature:

- Use the logoff feature when you:
    - Complete a license transaction and no other customers are waiting
    - Finish practicing using the application in training mode
    - Complete a management-related task

End Shift Report

To Demonstrate - End Shift Report

This demonstration shows how to access the End Shift report from the MAIN menu.

You can also access this report from **MANAGEMENT** on the MAIN menu, under **PROCESS REPORTS**.

Step 1

Log on (if necessary).

Step 2

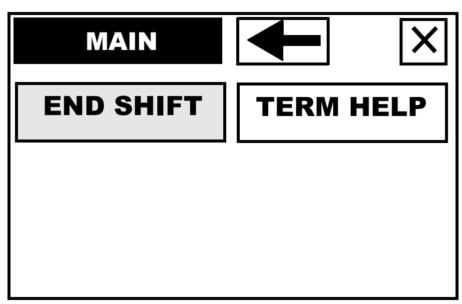
Bypass training mode.

Step 3

Touch **MORE** on the MAIN menu.

Step 4

Touch **END SHIFT** on the second MAIN menu.



The application automatically generates an End Shift report.

About the End Shift Report

These are important points to remember about the End Shift report:

- The End Shift report provides:
  - A detailed itemization of all transactions
  - Licensing information from the last time an End Shift report was run to this report
  - For shifts crossing midnight the report breaks out the transactions into two separate reports - one for each calendar day
  - Licensing information only for the terminal from which the report is generated
- From the MAIN menu only the most recent shift report can be run
- From the Management option past shift reports can be run
- Access to the End Shift report on the MAIN menu can be disabled

Terminal Help

To Demonstrate - Terminal Help

This demonstration shows how to access Terminal Help and select a topic to view and print.

Step 1

Log on (if necessary).

Step 2

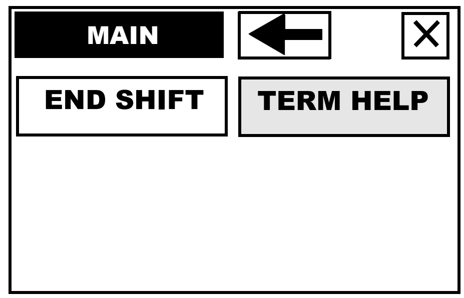
Bypass training mode.

Step 3

Touch **MORE** on the MAIN menu.

Step 4

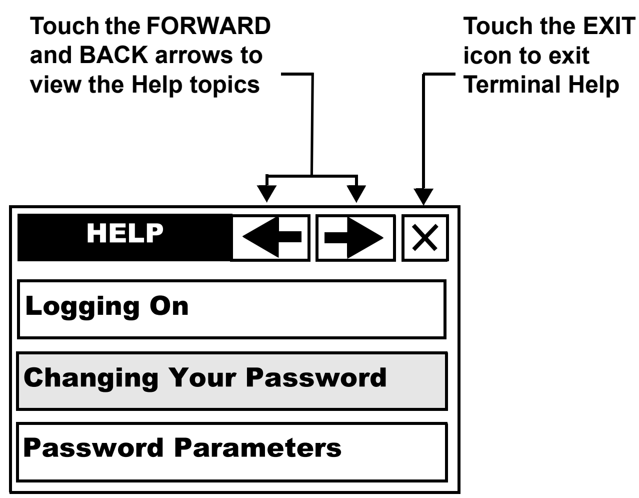
Touch **TERM HELP** on the second MAIN menu.



Step 5

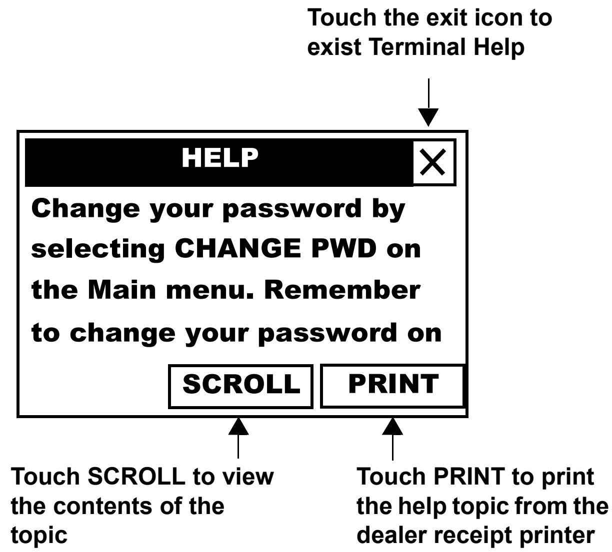
Scroll through the list of topics to find the topic you are searching for.

Touch the topic to view it.



Step 6

Use **SCROLL** to read the entire contents of the help topic.



Step 7

Options:

- Touch **SCROLL** to view the help topic contents
- Touch **PRINT** to print the topic from the dealer receipt printer
- Touch the **EXIT** icon to leave Terminal Help.

Practice Exercise

In this exercise you will access:

- Messages from TPW
- End Shift report
- Logoff feature

To Start - Log on

1. Log on using the Clerk's user ID and password.
2. Bypass training mode.

   The MAIN menu appears.

Access Messages from TPW

1. Touch **READ MSG** on the main menu.
2. Touch **SCROLL** to view the entire message.
3. Touch **PRINT** to print the message.

   The MAIN menu appears.

Access and Generate an End Shift Report

1. Touch **MORE** on the MAIN menu.
2. Touch **END SHIFT** on the MAIN menu.

   The End Shift report prints and the MAIN menu appears.

Access the Logoff Feature to Log Off

Touch **LOGOFF** on the MAIN menu.

The USER ID LOGON screen appears.

Unit VII
Management Tasks

Lesson 13

Authorizing Users

Lesson Objectives

When you finish this lesson you should be able to:

- Authorize new users for a point of sale terminal by:
    - Assigning user IDs and passwords
    - Assigning user privileges (roles)
- Remove users from the point of sale terminal
- Edit a user's password and privileges

Lesson Overview

Authorizing users is the most important task to complete after setting up and activating your point of sale terminal.

Without authorizing users you cannot conduct licensing transactions at your location.

This feature also helps to deter unauthorized access to your point of sale terminal and the TLC system and to establish access privileges for specific functions within the application.

As your business needs change this feature will give you the needed flexibility to add new users, delete current users, and edit the passwords and roles of existing users.

In this lesson we will explain how you assign user IDs and passwords to new users so they can log on to use the application and how to assign the roles appropriate to the user's level of responsibility.

Importance of Authorizing Users

Authorizing users is your next step after setting up and activating your point of sale terminal.

Without assigning the Clerk role to users no one at your location an perform any licensing transactions.

Authorizing a New User

To Demonstrate - Authorizing a New User

This demonstration shows how to assign a user ID and password to a new user.

Access the Authorize Users Function

Step 1

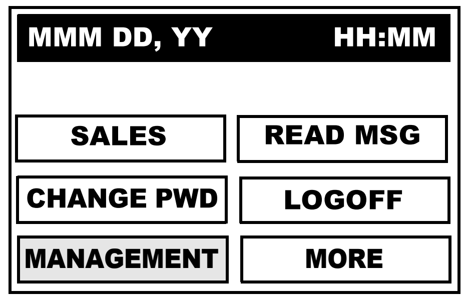
Log on (if necessary).

Step 2

Bypass training mode.

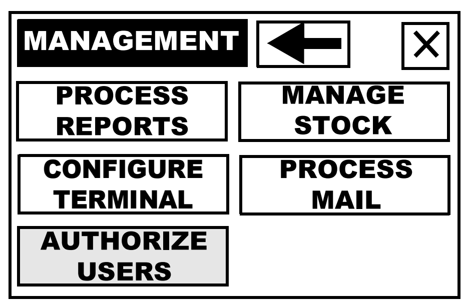
Step 3

Touch **MANAGEMENT** on the MAIN menu.



Step 4

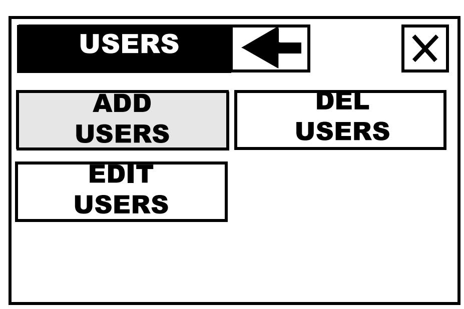
Touch **AUTHORIZE USERS** on the MANAGEMENT menu.



Add a New User

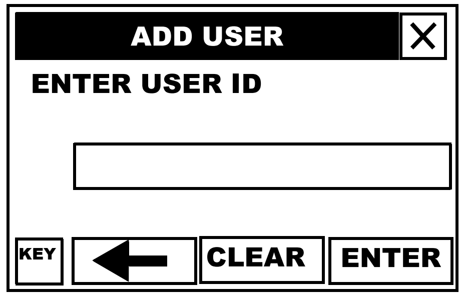
Step 1

Touch **ADD USERS** on the USERS menu.



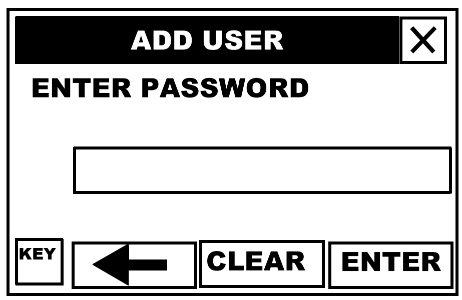
Step 2

Type the user's user ID and touch or press **ENTER**.



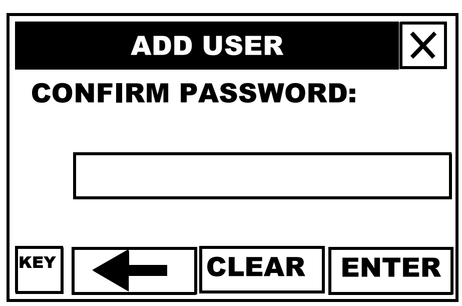
Step 3

Type the user's password and touch or press **ENTER**.



Step 4

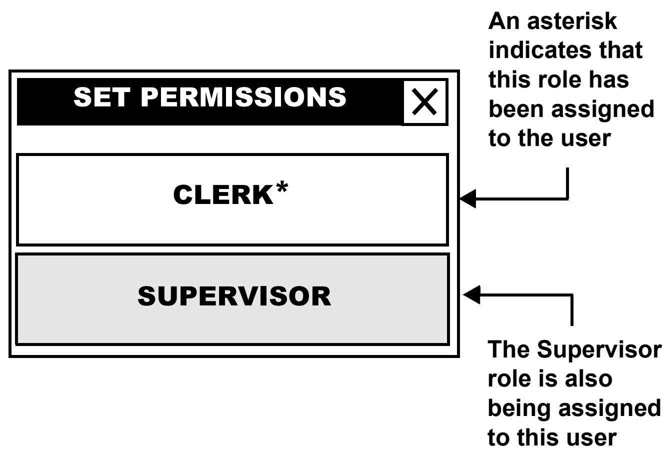
Type the user's password a second time to confirm it, then touch or press **ENTER**.



Step 5

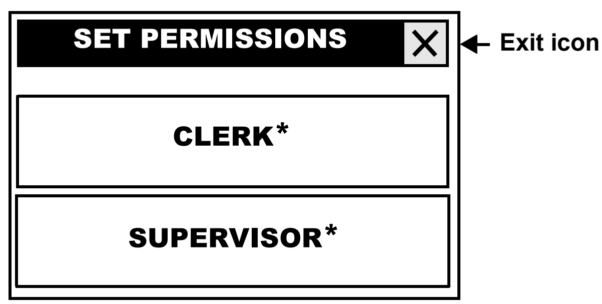
Touch the Clerk and Supervisor permissions.

(In this demonstration the trainer has logged on as the Agent Location Manager so both the Clerk and Supervisor roles are available.)



Step 6

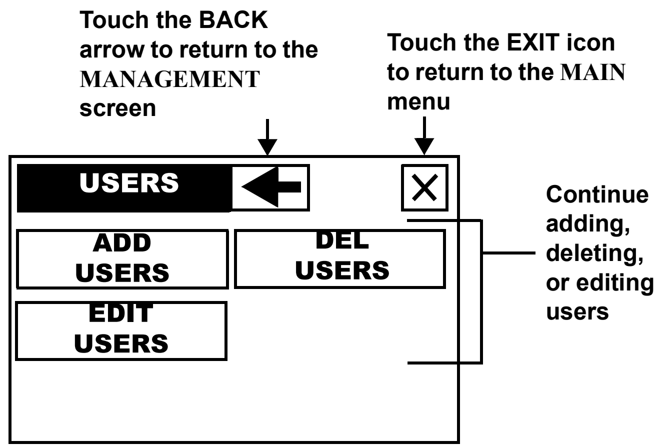
Touch the **EXIT** icon to return to the USERS screen.



Step 7

Options:

- Touch the **EXIT** icon to return to the MAIN menu
- Touch the **BACK** arrow to return to the MANAGEMENT screen
- Continue adding, deleting or editing users from the USERS screen



Touch the **EXIT** icon to return to the MAIN menu.

User ID and Password Parameters

When entering a user's ID and password you *must* adhere to the following parameters.

Minimum of 5 characters Maximum of 10 characters	Your user ID and password must have the correct number of characters. It can be any combination of alpha and numeric characters.
No sequential characters	You cannot use sequences such as 12345 or abcde.
No recurring characters	You cannot use recurring characters such as 22222 or ccccc.

Case sensitive	Your user ID and password are case sensitive. Always use the same combination of upper and lower case letters. Be sure the Caps Lock feature on your keyboard is off when you: • Enter your user ID and password to log on • Change your password

If you enter a user ID or password that violates one of these parameters the application beeps twice and remains at the screen where the violation occurred.

Authorize a New User at Each Terminal

At locations with multiple terminals authorize the new user at each of those terminals.

Authorizations are stored locally, on each terminal, not in the TLC database.

Authorizing a user at one terminal does not automatically authorize the user at other terminals at your location.

Protocol for User IDs

Consider a consistent method of assigning user IDs, such as the first initial of the user's first name followed by their last name, to maximum of 10 characters.

Whatever method you use, it is a good idea to keep your user ID assignments consistent.

Deleting a User

To Demonstrate - Deleting a User

This demonstration shows how to delete a user from the point of sale terminal.

When you delete a user you remove that individual's access to the point of sale terminal and the TLC system.

Access the Authorize Users Function

Step 1

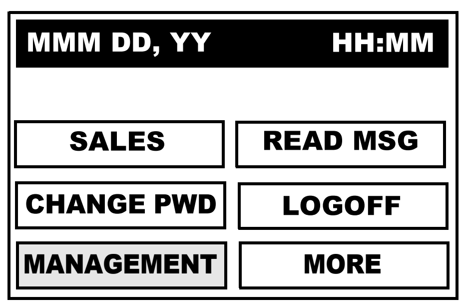
Log on (if necessary).

Step 2

Bypass training mode.

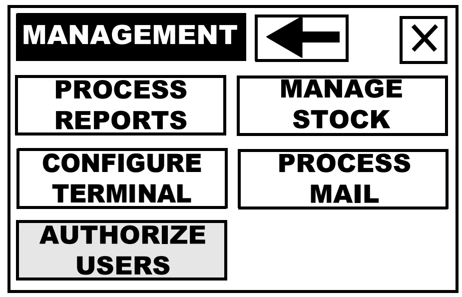
Step 3

Touch **MANAGEMENT** on the MAIN menu.



Step 4

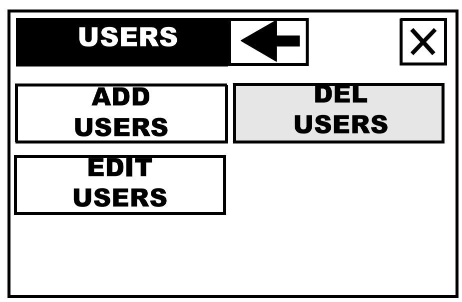
Touch **AUTHORIZE USERS** on the MANAGEMENT menu.



Delete a User

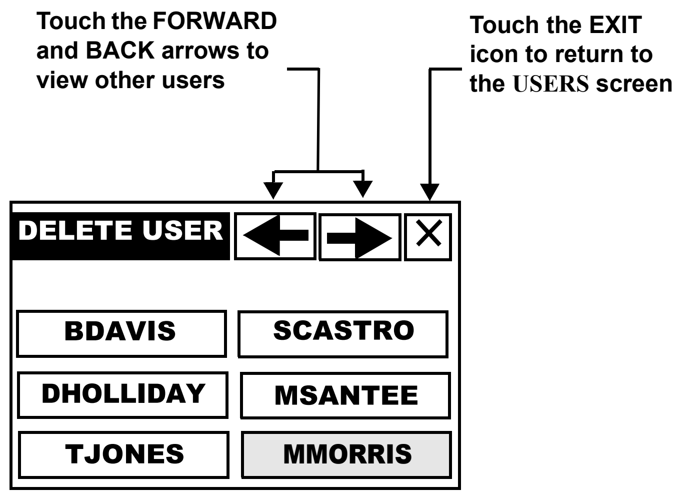
Step 1

Touch **DEL USERS** on the USERS menu.



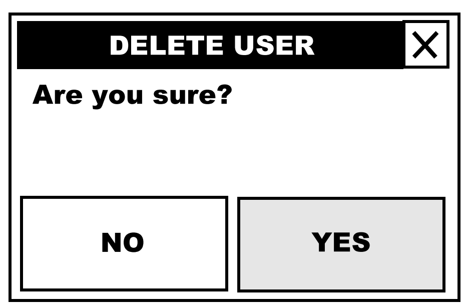
Step 2

Touch the user you want to delete.



Step 3

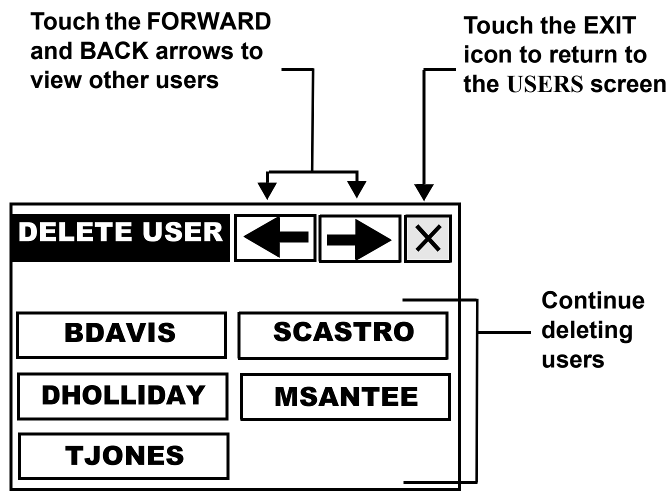
Touch **YES** or press **ENTER** to confirm the deletion.



Step 4

Options:

- Touch the **EXIT** icon to return to the USERS screen
- Continue deleting users from the DELETE USER screen

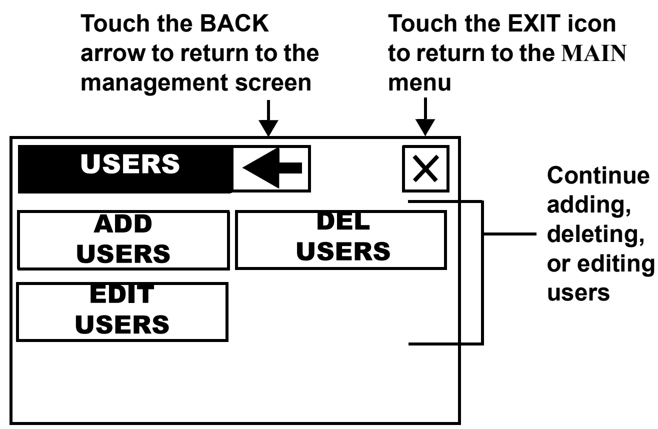


Touch the **EXIT** icon to return to the USERS menu.

Step 5

Options:

- Touch the **EXIT** icon to return to the MAIN menu
- Touch the **BACK** arrow to return to the MANAGEMENT screen
- Continue adding, deleting or editing users from the USERS screen



Touch the **EXIT** icon to return to the MAIN menu.

Delete the User at Each Terminal

At locations with multiple terminals delete the user at each terminal.

Authorizations are stored locally, on each terminal, not on the TLC database.

Deleting a user at one terminal does not automatically delete the user at other terminals at your location.

Editing a User’s Profile

To Demonstrate - Editing a User

This demonstration shows how to edit a user on the point of sale terminal.

Editing a user includes:

- Changing their user ID
- Changing their password
- Adding or removing role assignments

Access the Authorize Users Function

Step 1

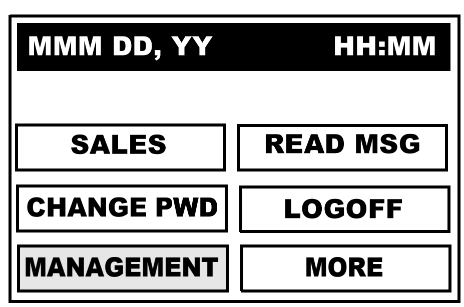
Log on (if necessary).

Step 2

Bypass training mode.

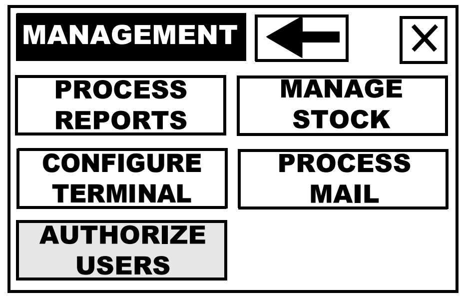
Step 3

Touch **MANAGEMENT** on the MAIN menu.



Step 4

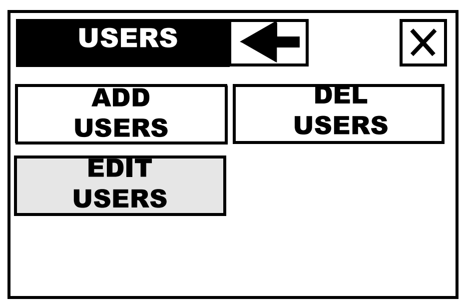
Touch **AUTHORIZE USERS** on the MANAGEMENT menu.



Edit a User

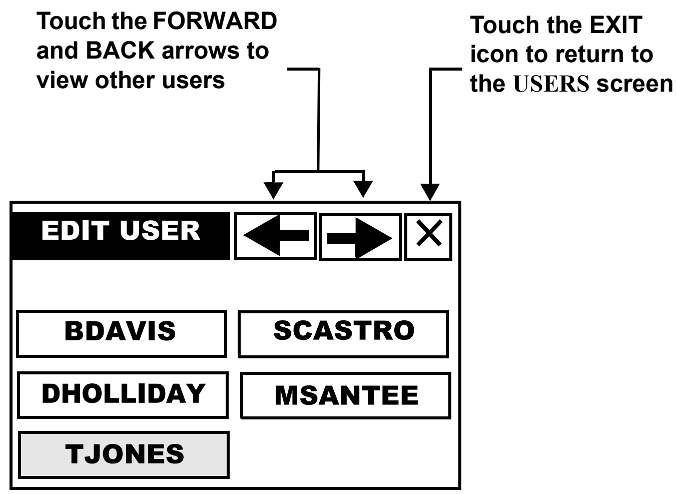
Step 1

Touch **EDIT USERS** on the USER menu.



Step 2

Touch the user whose profile you want to edit.

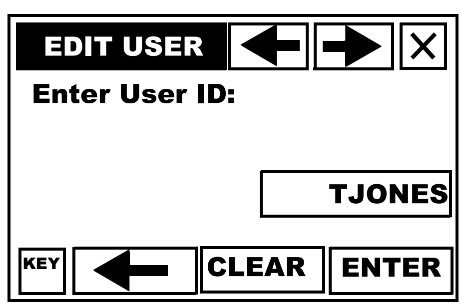


Step 3

Options:

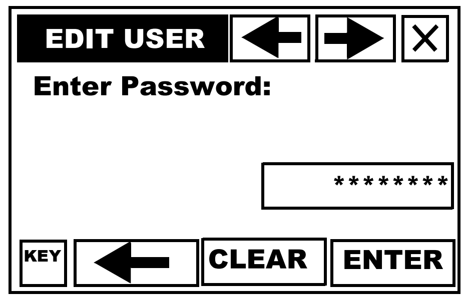
- You can edit the user's ID.

  If you edit their ID you will also have to edit their password and confirm it.



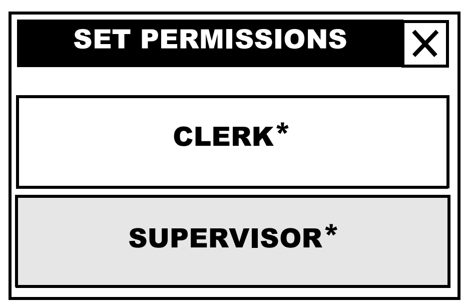
- You can edit their password

  If you edit their password you will also have to confirm it.

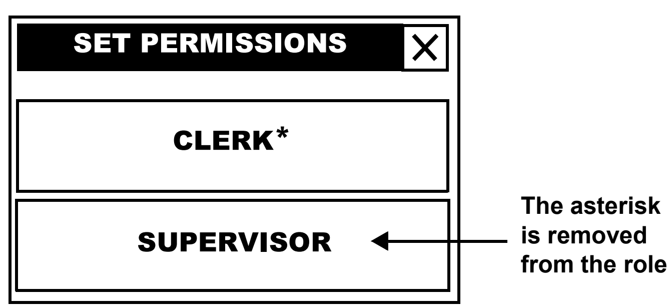


- You can edit their role assignment

  Based on *your* role assignment you can either add or remove role assignments for a user.

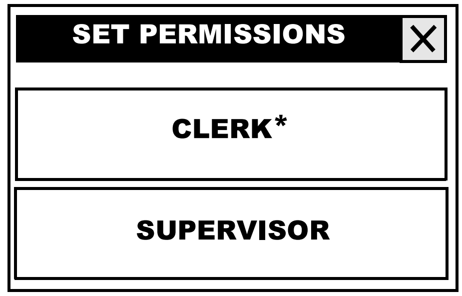


Touch the **SUPERVISOR** role to remove it from the user's profile.



Step 4

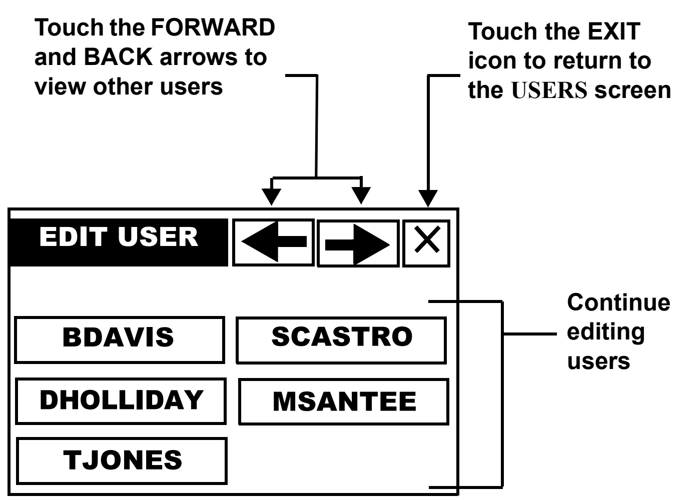
Touch the exit icon to return to the EDIT USER screen.



Step 5

Options:

- Touch the **EXIT** icon to return to the USERS screen
- Continue editing users from the EDIT USER screen



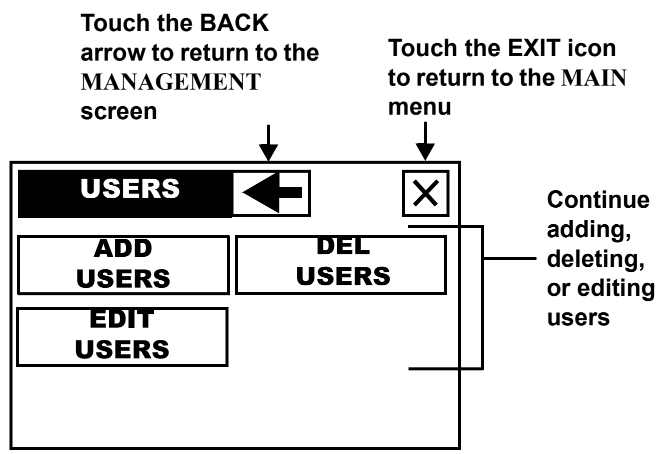
Touch the **EXIT** icon to return to the USERS screen.

Step 6

Options:

- Touch the **EXIT** icon to return to the MAIN menu
- Touch the **BACK** arrow to return to the MANAGEMENT screen

- Continue adding, deleting or editing users from the USERS screen



Touch the **EXIT** icon to return to the MAIN menu.

Changing a Password for a User

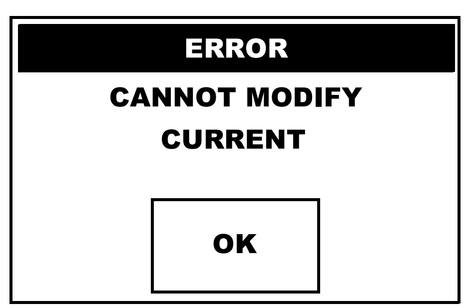
Sometimes a user will forget their password. You can use the Edit User feature to create a new password for that user.

You do not need the user's original password to do this.

Current Users Cannot Edit Themselves

A user who is logged on cannot access the Edit Users feature to edit their own logon and role assignments.

The following message appears:



Touch **OK** or press **ENTER** to clear the message and return to the EDIT USERS screen.

Assigning Roles

Roles are used to assign access privileges to certain functions in the application.

There are three roles:

- Agent Location Manager
- Supervisor
- Clerk

Each user must be assigned at least one role.

A user can be assigned both a Clerk and Supervisor role, however, there is only one Agent Location Manager role for each location.

If you are assigned the...	You...
Agent Location Manager role	Can authorize users and assign the following roles: • Supervisor • Clerk
Supervisor role	Can authorize users and assign the following role: • Clerk
Clerk role	Cannot authorize users or assign roles

Each user's job description or level of responsibility dictates the role to which they should be assigned.

Assigning Roles Based on Tasks

After creating a user ID and assigning a password to a user the next step is deciding what role to assign.

The following table lists the tasks assigned to each.

Role	Assigned Tasks
Agent Location Manager	**Licensing** None **Terminal-Related** • Read TPW messages • Log off • Generate an End Shift report • Access Terminal Help **Management-Related** • Authorize users (Supervisor and Clerk role) • Process reports • Read TPW messages (expanded functions) • Configure the point of sale terminal • Order terminal supplies
Supervisor	**Licensing** None **Terminal-Related** • Read TPW messages • Log off • Generate an End Shift report • Access Terminal Help • Change password **Management-Related** • Authorize users (Clerk role only) • Process reports • Read TPW messages (expanded functions) • Configure the point of sale terminal • Order terminal supplies

Role	Assigned Tasks
Clerk	**Licensing** • Retrieve/add customers • Issue licenses • Void licenses • Replace licenses **Terminal-Related** • Generate and print End Shift reports • Access TPW messages and Help topics • Change password **Management-Related** None

Note: The Agent Location Manager *must* assign the Clerk role to himself/herself to sell licenses.

Authorization Scenarios

Here are two possible business scenarios to show how you might determine role assignments at your location.

Sole Proprietor

A sole proprietor has only himself or herself as an employee or maybe a small number of employees.

The sole proprietor is assigned the Agent Location Manager role.

The Agent Location Manager cannot sell licenses. In order to sell licenses that individual *must* assign to himself or herself the Clerk role.

To do this the sole proprietor authorizes a new user for himself or herself, assigning a user ID and password, and also assigning both the Clerk and Supervisor roles.

Only the Clerk role is necessary for licensing transactions, however, by assigning both roles the sole proprietor needs only one log on to access licensing, terminal-related, and management-related functions.

The sole proprietor can then authorize other individuals as necessary.

Multiple-Terminal Locations

At multiple-terminal locations where employees work in shifts the Agent Location Manager has several options.

The Agent Location Manager can:

- Authorize all users and assign roles appropriate to their responsibilities
- Authorize individuals with the Supervisor role who, in turn, can authorize users with the Clerk role

Assign Both Roles to Individuals with Management Responsibilities

The Agent Location Manager should assign both the Supervisor and Clerk roles to individuals with licensing and management responsibilities.

This way that individual needs only one log on to perform all terminal tasks.

Otherwise that individual has to authorize a new user with the Clerk role for himself or herself and use the appropriate log on that is associated with the task to perform.

Practice Exercise

In this exercise you will:

- Authorize a new user
- Edit the new user's password
- Delete the new user

Access the Authorize Users Function

1. Log on using the Supervisor's user ID and password.
2. Bypass training mode.

   The MAIN menu appears.
3. Touch **MANAGEMENT** on the MAIN menu.
4. Touch **AUTHORIZE USERS** on the MANAGEMENT menu.

   The USERS screen appears.

Add a User

1. Touch **ADD USERS** on the USERS screen.
2. Type the following user ID: balberts.
3. Touch or press **ENTER**.
4. Type the following password: fishing.
5. Touch or press **ENTER**.
6. Re-type the password (fishing).
7. Touch or press **ENTER**.

   The SET PERMISSIONS screen appears.
8. Touch **CLERK**.

   An asterisk appears by the Clerk role.
9. Touch the **EXIT** icon to return to the USERS screen.

Edit a User

1. Touch **EDIT USERS** on the USERS screen.
2. Touch **BALBERTS** on the EDIT USER screen.

   The User ID screen appears showing balberts
3. Touch or press **ENTER** to continue to the PASSWORD screen.
4. Touch **CLEAR** or press **DEL[ETE]** to clear the current password.
5. Type the following password: hunting.
6. Touch or press **ENTER**.
7. Re-type the password (hunting).

8. Touch or press **ENTER**.

   The SET PERMISSIONS screen appears.

9. Touch the **EXIT** icon to return to the EDIT USER screen.
10. Touch the **EXIT** icon to return to the USERS screen.

Delete a User

1. Touch **DEL USERS** on the USERS screen.
2. Touch **BALBERTS** on the DELETE USER screen.
3. Touch **YES** or press **ENTER** to confirm.

   The DELETE USER screen appears.

   The user previously added is now deleted.

4. Touch the **EXIT** icon to return to the USERS screen.
5. Touch the **EXIT** icon to return to the MAIN menu.

Stop Here

Lesson 14

Generating and Printing Reports

Lesson Objectives

When you finish this lesson you should be able to:

- Generate and print sales and administrative reports

Lesson Overview

Reporting is one of the management tools available on the point of sale terminal.

Reports fall into two categories: financial and administrative.

Financial reports help you manage your sales and plan deposits to your bank account for the electronic funds transfer.

Administrative reports provide information on the status of voided or reprinted licenses that you need to return to TPW and, if applicable, controlled inventory at your location.

In this lesson we will describe the reports in detail and show you how to generate them.

Types of Reports

The two report categories are financial and administrative.

These are the reports in each category available from your point of sale terminal:

Financial Reports

Report Name	Function
Shift Report **(End Shift Report)**	• Provides detailed license sales activity for an individual point of sale terminal • Used at shift change over to balance receipts against sales • Reporting period is from the last time a Shift report was run • If a shift covers two calendar days the report is divided into two, one for each day
Daily Sales Report	• Provides detailed license sales activity for specific reporting periods • Reporting period is a calendar day (beginning at midnight) • Can be generated more than once during a day and provides cumulative information from the beginning of the reporting period to the point when the report is generated • At multiple terminal locations report includes detailed license activity for each terminal • Used to balance receipts against licensing activity and make daily deposits to bank account for the electronic funds transfer
Account Notice Report	• Provides the date, time, and amount of the electronic funds transfer • Provides summary data on all financial transactions

Administrative Reports

Report Name	Function
Returnable Documents Report	• Lists licenses that should be returned to TPW due to voids or reprints but have not yet been received
Controlled Inventory Report	• Not available for the licensing agents at retail locations

Generating Financial Reports

To Demonstrate - Accessing and Printing Financial Reports

This demonstration shows how to access each of the financial reports and print them.

Accessing the Reports

Step 1

Log on (if necessary).

Step 2

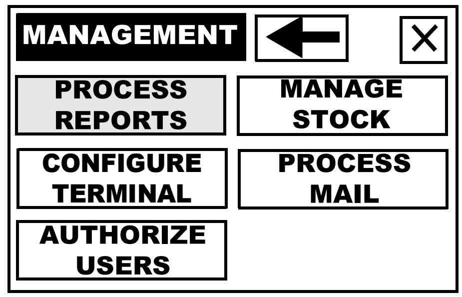
Bypass training.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

Step 4

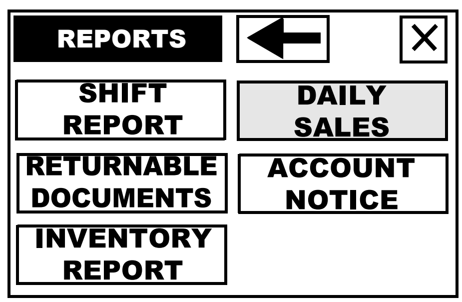
Touch **PROCESS REPORTS** on the MANAGEMENT menu.



Select a Financial Report

Step 1

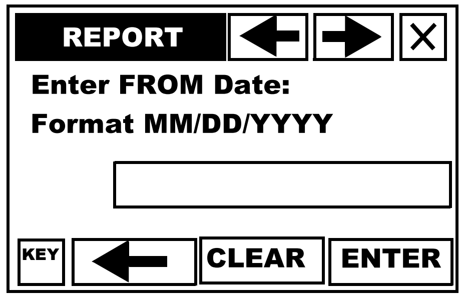
Touch the **DAILY SALES** report.



Step 2

Options:

- Clear the default date and type a new report date
- Accept the default date



Touch **CLEAR** or press **DEL[ETE]**, type today's date, then touch or press **ENTER**.

The report prints from the dealer receipt printer.

The application returns to the MAIN menu.

Report Dates for All Financial Reports

For each of these three reports you need to provide a report date before generating the report.

The screen displayed to enter the FROM date for this demonstration is the same for the other two reports.

About the Financial Reports

Each report serves a specific purpose and provides different information.

All three reports print from the dealer receipt printer.

Shift Report

These are important points to remember about the Shift report.

The Shift report provides:

- A detailed listing of all transactions, including fees and refunds, by transaction number
- Net amount of all licensing transactions
- Licensing transaction information from the last time a Shift report was generated to the present report
- Transaction information only for the terminal from which the report is generated
- For shifts crossing midnight the report breaks out the transactions into two separate reports - one for each calendar day

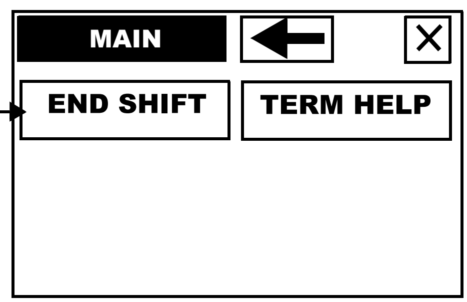
Reconciling Receipts Against Licensing Activity

Use the Shift report to reconcile your receipts for each shift during the day against license sales.

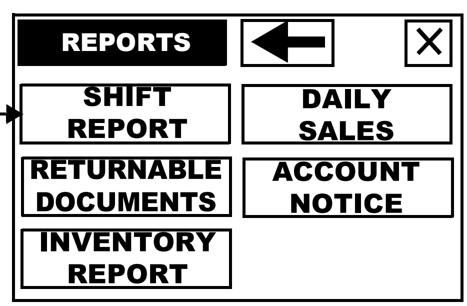
Accessing the Shift Report

You can access the Shift report two different ways.

From the second MAIN **menu**



From the Reports menu under Management>Process Reports



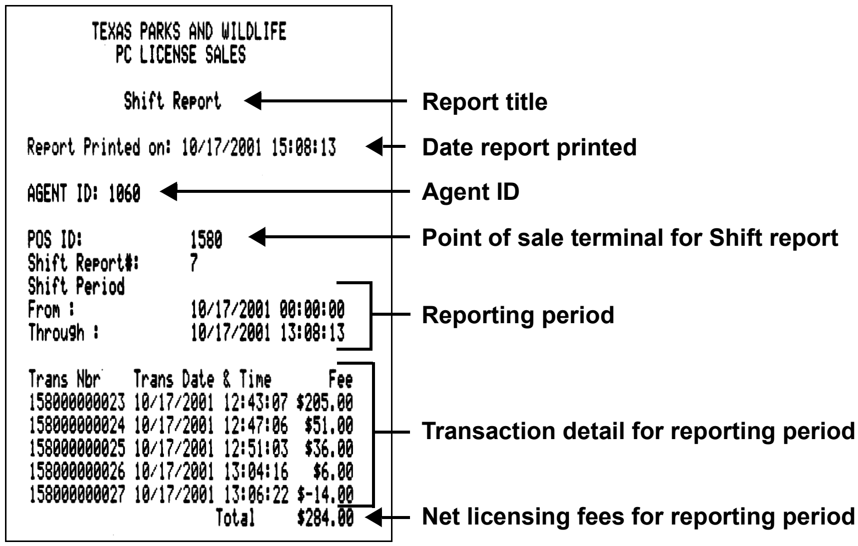
Note: The End Shift report and the Shift report are essentially the same reports.

If you access the report from the...	Then...	And...
Second MAIN **menu screen**	• You can generate only the current report • You cannot generate a past report	• Users assigned either the Clerk or Supervisor roles can access and generate the report
REPORTS **menu**	• You can generate a Shift report from a previous day • You can see all the shift reports generated for the specified day	• Only users assigned the Supervisor or Agent Location Manager role can access and generate the report

Disabling the End Shift Report From the Main Menu

Access to the End Shift report from the second MAIN menu can be disabled. This is done under the Management option.

Sample Shift Report



Daily Sales Report

These are important points to remember about the Daily Sales report.

The Daily Sales report provides:

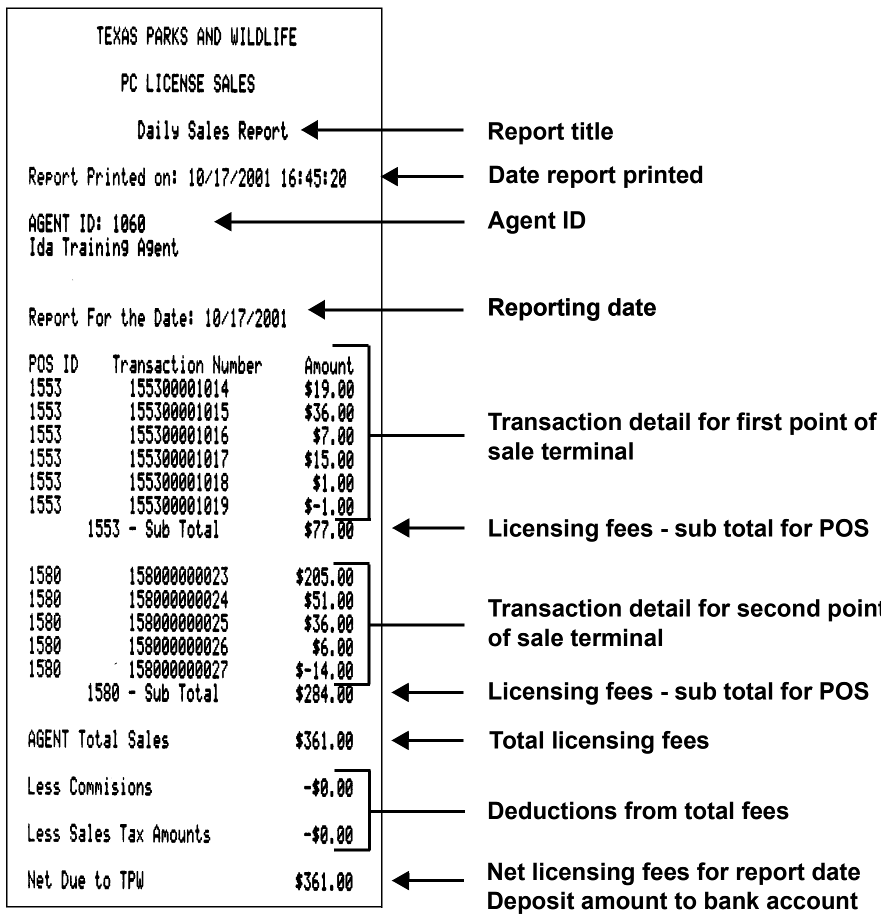
- A detailed listing of all transactions, including fees and refunds, by transaction number and by point of sale terminal
- Net amount of all licensing transactions for all point of sale terminals combined
- Reporting period is a calendar day (beginning at midnight)
- Licensing transaction information is provided from the beginning of the reporting period to the point when a new report is run
  - Can be run anytime during the day
  - Can be run multiple times during the day
- Licensing transaction information for a past date when date is specified

Reconciling Receipts and Planning Daily Deposits

Use the Daily Sales report to:

- Reconcile receipts against licensing transactions
- Plan daily deposits to your bank account for the electronic funds transfer

Sample Daily Sales Report



TEXAS PARKS AND WILDLIFE

PC LICENSE SALES

Daily Sales Report

Report Printed on: 10/17/2001 16:45:20

AGENT ID: 1060
Ida Training Agent

Report For the Date: 10/17/2001

POS ID	Transaction Number	Amount
1553	155300001014	$19.00
1553	155300001015	$36.00
1553	155300001016	$7.00
1553	155300001017	$15.00
1553	155300001018	$1.00
1553	155300001019	$-1.00
	1553 - Sub Total	$77.00
1580	158000000023	$205.00
1580	158000000024	$51.00
1580	158000000025	$36.00
1580	158000000026	$6.00
1580	158000000027	$-14.00
	1580 - Sub Total	$284.00

AGENT Total Sales	$361.00
Less Commisions	-$0.00
Less Sales Tax Amounts	-$0.00
Net Due to TPW	$361.00

Account Notice Report

These are important points to remember about the Account Notice report.

The Account Notice report provides:

- The date and time that funds will be swept from your bank account
- Total amount that will be swept from the account, including:
    - Licensing fees
    - Other charges, such as lease fees
- Listing of any disputed amounts
- A summary of financial information, organized into specific categories, for the location, such as:
    - Disputed amounts
    - Chargebacks for voided or reprinted licenses not yet returned
    - Amounts owed to TPW currently on hold (not yet swept)

Reconciling The Account Notice Report to Daily Sales Reports

The amount shown for Sub-Total Sales under Current Charges should equal the totals from the Daily Sales reports for the period covered by the Account Notice report.

The reporting period is set by TPW and is subject to change.

Discrepancies in the Account Notice Report

If you find a discrepancy contact the WorldCom Help Desk immediately. The staff will review the disputed amount and notify TPW for further review if your question cannot be resolved during the call.

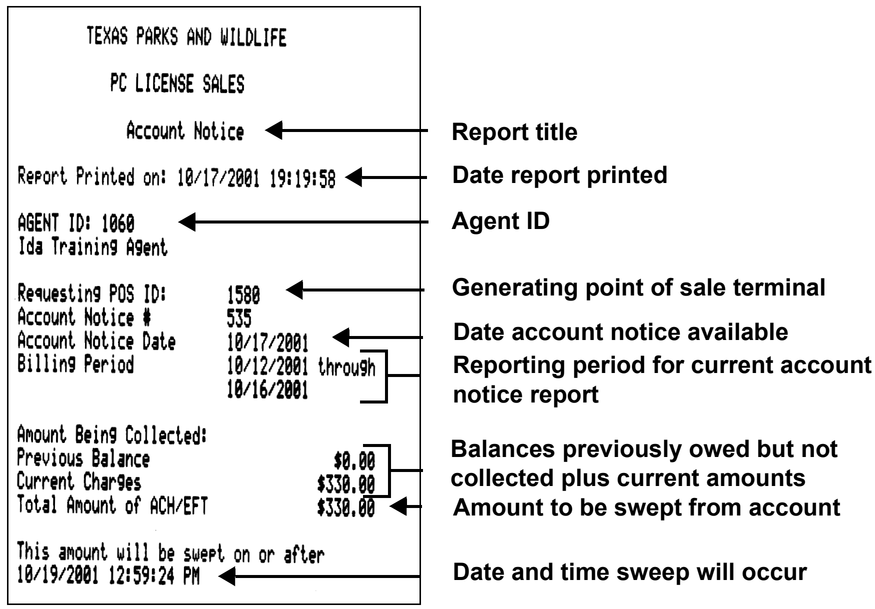
Sample Account Notice Report

The sample Account Notice report is presented in two parts because of the length.

Your Account Notice report will print on one piece, not two.

The first part provides the date, time, and amount of the electronic funds transfer plus general information such as report date, agent ID and so forth.

The second part provides detailed financial information about the funds owed to TPW.



TEXAS PARKS AND WILDLIFE

PC LICENSE SALES

Account Notice

Report Printed on: 10/17/2001 19:19:58

AGENT ID: 1060
Ida Training Agent

Requesting POS ID:	1580
Account Notice #	535
Account Notice Date	10/17/2001
Billing Period	10/12/2001 through 10/16/2001

Amount Being Collected:

Previous Balance	$0.00
Current Charges	$330.00
Total Amount of ACH/EFT	$330.00

This amount will be swept on or after
10/19/2001 12:59:24 PM

ACCOUNT DETAILS

Current Charges

Current Charges :: Sales

Date	# of Trxns	Net Amount Due to TPW	
10/12/2001	2	$	38.00
10/13/2001	4	$	76.00
10/14/2001	2	$	44.00
10/15/2001	13	$	153.00
10/16/2001	1	$	19.00
Sub Total : Sales			$330.00

Current Charges :: Non-Sales

Trxn Trxn Dt POS ID
Doc# Amount
Sub Total $0.00

Sub Total : Non-Sales $0.00

Current Due Amount Total $

CURRENT CHARGES

Includes charges in reporting period from sales (licenses) and non-sales (equipment lease fees, NSF charges, and so forth).

Current Due Amount Total is the sum of these two categories added together.

Amounts Due From Prior Periods

Amounts Due From Prior Periods::
Previously Disputed Transactions

Trxn Trxn Dt POS ID
Doc# Amount
Sub Total : Previously Disputed Transactions $0.00

Amounts Due From Prior Periods::
Previously Held Account Notices

AN # AN DT Billing Period Amount
Sub Total $0.00

Amounts Due From Prior Periods::
ACH/EFT Resubmits
AN # AN DT Billing Period Amount
Sub Total $0.00
Amounts Due From Prior Periods $0.00

AMOUNTS DUE FROM PRIOR PERIODS

Includes previously disputed transactions that have been resolved, previously held account notice amounts not swept that have been resolved, and TPW resubmittals of sweeps which were originally rejected by the agent's bank.

Amounts Due From Prior Periods is the sum of these categories added together.

Amounts On Hold As of Today

Amounts Disputed(Pending Resolutions)

Trxn Trxn Dt POS ID
Doc# Amount
Sub Total $0.00

Total Amount Disputed $0.00

Previous Account Notices ON HOLD

AN # AN DT Billing Period Amount
Sub Total $0.00

Total Amount on Hold As of Today $0.00

Account Balance $0.00

Total Amount of ACH/EFT $330.00

AMOUNTS ON HOLD AS OF TODAY

Includes transaction-specific amounts the agent is disputing and account notice amounts from previous notices that, for some reason, have not yet been swept.

Total Amount on Hold as of Today is the sum of these categories added together.

ACCOUNT BALANCE

This is the total amount owed to TPW, including amounts to be swept in this reporting period and amounts on hold (transactions and account notices).

This is not the amount being swept from the Agent's account.

TOTAL AMOUNT OF ACH/EFT

This is the amount to be swept from your account

Generating Administrative Reports

To Demonstrate - Accessing and Printing Administrative Reports

This demonstration shows how to access administrative reports and print them.

Accessing the Reports

Step 1

Log on (if necessary).

Step 2

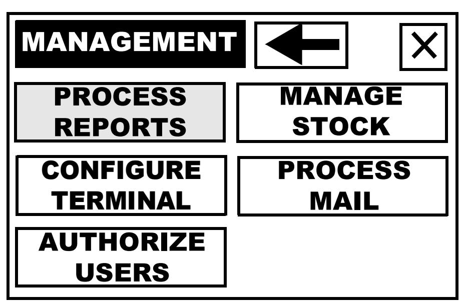
Bypass training.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

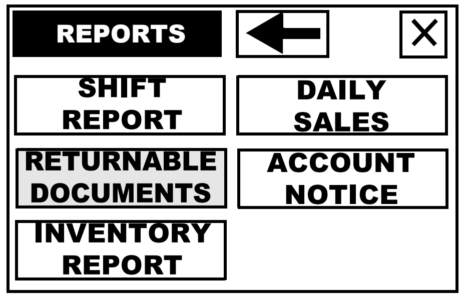
Step 4

Touch **PROCESS REPORTS** on the MANAGEMENT menu.



Select an Administrative Report

Touch the **RETURNABLE DOCUMENTS** report.



The Returnable Documents report prints from the dealer receipt printer.

The application returns to the MAIN menu.

Returnable Documents Report

These are important points to remember about the Returnable Documents report.

The Returnable Documents report provides:

- A detailed listing of each voided or reprinted license to be returned to TPW, including:
  - License type
  - Customer TLC ID #
  - Document #
  - Refunded amount for each license
- Total chargeback amount for all licenses

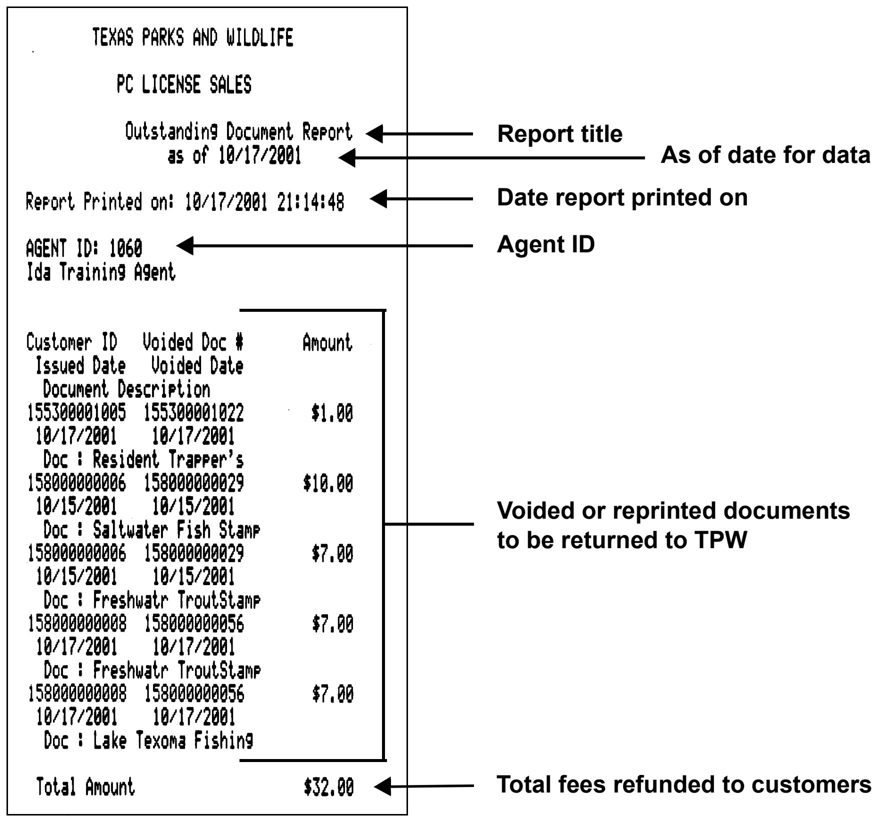
> **Note: Voided and reprinted licenses and license-related items must be returned to TPW within a specified period of time, currently set at 45 days, of the transaction date to receive proper credit and avoid having chargeback fees swept from your account.**

Past Reports Not Available

The Returnable Documents report is a running report of voided and reprinted licenses that you need to return to TPW.

The report lists each of the items that have not yet been received by TPW.

Sample Returnable Documents Report



TEXAS PARKS AND WILDLIFE

PC LICENSE SALES

Outstanding Document Report
as of 10/17/2001

Report Printed on: 10/17/2001 21:14:48

AGENT ID: 1060
Ida Training Agent

```
Customer ID   Voided Doc #       Amount
 Issued Date   Voided Date
  Document Description
155300001005  155300001022        $1.00
 10/17/2001    10/17/2001
  Doc : Resident Trapper's
158000000006  158000000029       $10.00
 10/15/2001    10/15/2001
  Doc : Saltwater Fish Stamp
158000000006  158000000029        $7.00
 10/15/2001    10/15/2001
  Doc : Freshwatr TroutStamp
158000000008  158000000056        $7.00
 10/17/2001    10/17/2001
  Doc : Freshwatr TroutStamp
158000000008  158000000056        $7.00
 10/17/2001    10/17/2001
  Doc : Lake Texoma Fishing

 Total Amount                    $32.00
```


Controlled Inventory Report

The Controlled Inventory Report is not applicable to retail licensing agents.

Practice Exercise

In this practice exercise you will:

- Generate and print a past Shift report
- Generate and print a current Daily Sales report
- Generate and print a Returnable Documents report

Access the Process Reports Menu

1. Log on using the Supervisor user ID and password.
2. Bypass training mode.
3. Touch **MANAGEMENT** on the MAIN menu.
4. Touch **PROCESS REPORTS** on the MANAGEMENT menu.

   The REPORTS screen appears.

Generate and Print a Shift Report

1. Touch **SHIFT** on the REPORTS menu.
2. Type yesterday's date.
3. Touch or press **ENTER** to generate and print a Shift report.

   The application returns to the MAIN menu.

Generate and Print a Daily Sales Report

1. Touch **MANAGEMENT** on the MAIN menu.
2. Touch **PROCESS REPORTS** on the MANAGEMENT menu.
3. Touch **DAILY SALES** on the REPORTS menu.
4. Touch or press **ENTER** to generate and print a Daily Sales report for the default date.

   The application returns to the MAIN menu.

Generate and Print a Returnable Documents Report

1. Touch **MANAGEMENT** on the MAIN menu.
2. Touch **PROCESS REPORTS** on the MANAGEMENT menu.
3. Touch **RETURNABLE DOCUMENTS** on the REPORTS menu to generate and print a Returnable Documents report.

   The application returns to the MAIN menu.

Stop Here

Lesson 15

Configuring Your Terminal

Lesson Objectives

When you finish this lesson you should be able to:

- Understand the terminal configuration options available
- Configure settings to your specific needs
- Print a license alignment test
- Run tests on your equipment and phone connection

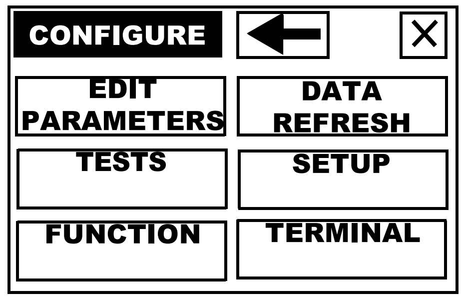
Lesson Overview

The application gives you the flexibility to configure a variety of settings for your point of sale terminal.

In this lesson we will demonstrate how to access these settings and explain their purpose.

Configuration Settings

There are six categories of configuration settings.



Category	Description
Edit Parameters	Variety of settings to control terminal behavior and administrative parameters
Data Refresh	Updates the licensing information on your terminal so that you always have the most recent changes in license availability, fees, and so forth.
Tests	Tests terminal hardware and software components
Setup	Changes settings specific to your Hypercom unit
Functions	Specialized settings to be used only with the assistance of the WorldCom Help Desk
Terminal	Enables you to reset your terminal and view the current version of the software

To Demonstrate - Accessing the Configure Terminal Settings

This demonstration shows how to access the CONFIGURE TERMINAL option on the MANAGEMENT menu.

All Configure Terminal settings are accessed in this way.

Step 1

Log on (if necessary)

Step 2

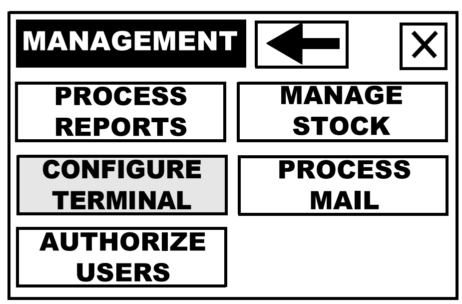
Bypass training mode.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

Step 4

Touch **CONFIGURE TERMINAL** on the MANAGEMENT menu.



Editing Parameters

Editing parameters covers a wide range of categories and values.

Some settings have values that are already preset and should not be changed without assistance from the Help Desk.

Other values are preset but can be changed.

To Demonstrate - Accessing Edit Parameters

This demonstration shows how to access the Edit Parameters settings and change the Enable End Shift report setting so that the report can only be accessed from the Management option and not from the second screen of the MAIN menu.

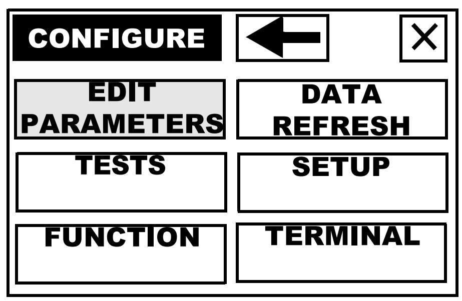
To Begin - Access the Configure Terminal Menu

From the MAIN menu access the CONFIGURE TERMINAL menu.

Change Parameter Setting

Step 1

Touch **EDIT PARAMETERS** on the CONFIGURE menu.

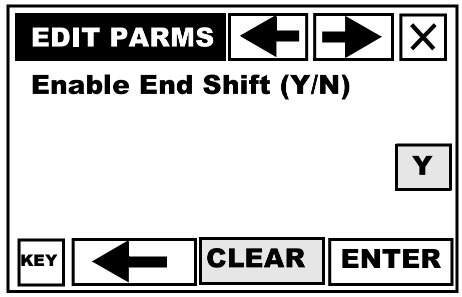


Step 2

Touch or press **ENTER** to continue through the EDIT PARMS screens to the Enable End Shift screen.

Step 3

At the Enable End Shift screen touch **CLEAR** or press **DEL[ETE]** to clear the existing value.

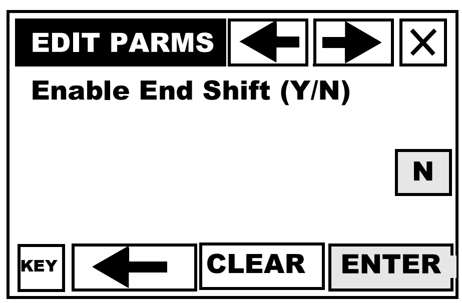


Step 4

Type "n" to change the value and disable access from the second MAIN menu.

Step 5

Touch or press **ENTER** to submit the value change.



Step 6

Touch the **EXIT** icon to return to the MAIN menu.

Edit Parameter Settings

Under Edit Parameters are the following settings, shown in the order in which they appear:

Settings	Value	Explanation
PABX	#	If you need to dial an initial number to get an external line, type the number here. An example is "8" or "9."
Agency ID	Preset	Number that identifies your location. This number appears on dealer receipts and reports.
Print 2nd receipt	Y/N	Instructs the receipt printer to print a duplicate receipt.
Cut receipt	Y/N	Instructs the printer to either cut the receipt after printing (Y) or leave uncut (N).
Enable End Shift	Y/N	If you select Y (Yes) users can access and print End Shift reports from the second MAIN menu screen. If you select N (No) no one can access the End Shift report from the second MAIN menu screen. With N selected access is only through the Management option on the MAIN menu and only to users with Supervisor or Agent Location Manager roles.
State tax percentage		Feature currently not supported
Local tax percentage		Feature currently not supported

Settings	Value	Explanation
NMS telephone #	Preset	Use only with Help Desk assistance
INIT telephone #	Preset	Use only with Help Desk assistance
TermMaster ID	Preset	Use only with Help Desk assistance
TermMaster dial time		Use only with Help Desk assistance
Agent name		Feature not supported
Agent address (line 1)		Feature not supported
Agent address (line 2)		Feature not supported
Agent address (line 3)		Feature not supported

To:

- Change an existing value touch **CLEAR** or press **DEL[ETE]** to clear that value then enter the new value and touch or press **ENTER**
- Enter a value in an empty data field, type the information then touch or press **ENTER**
- Leave an existing value unchanged touch or press **ENTER**.
- Exit the Edit Parameters screens touch the **EXIT** icon or press **ESC[APE]**

Data Refresh

Data Refresh updates the way your point of sale terminal handles licensing transactions.

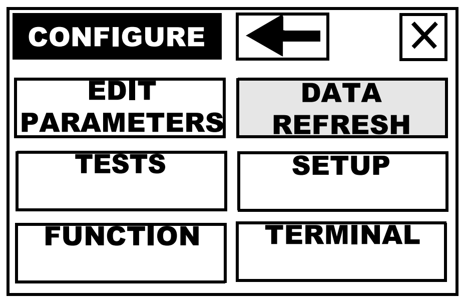
Licensing information such as fees and availability (seasonality) are subject to change. When a change occurs your terminal needs to be updated to reflect the change.

A data refresh normally occurs automatically. However, there may be instances when you need to do this manually.

When a manual data refresh is required a message appears on your terminal. Touch or press **ENTER** to clear the message then access this option and run the data refresh process.

Initiating a Data Refresh

When you touch **DATA REFRESH** on the CONFIGURE menu the terminal automatically dials the TLC system to download the latest information.



When the download is complete the following message appears:

TRANSACTION COMPLETE

The application returns to the MAIN menu.

Tests

The Test setting enables you to test your equipment to make sure everything is working properly and to test whether or not your connection to the TLC system is operational.

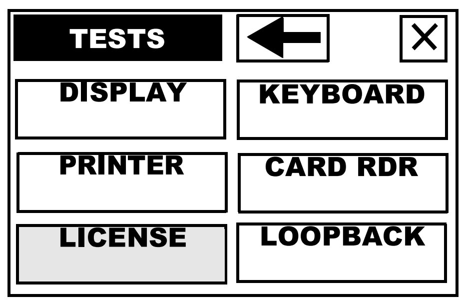
These tests include:

Option	Description
Display	Display on the Hypercom unit
Keyboard	External keyboard

Option	Description
Printer	Dealer receipt printer
Card reader	Magnetic strip reader
License	Prints a license alignment test
Loopback	Tests the telephone line connection to the TLC system

License Test

This is a very important test and one you should be familiar with.



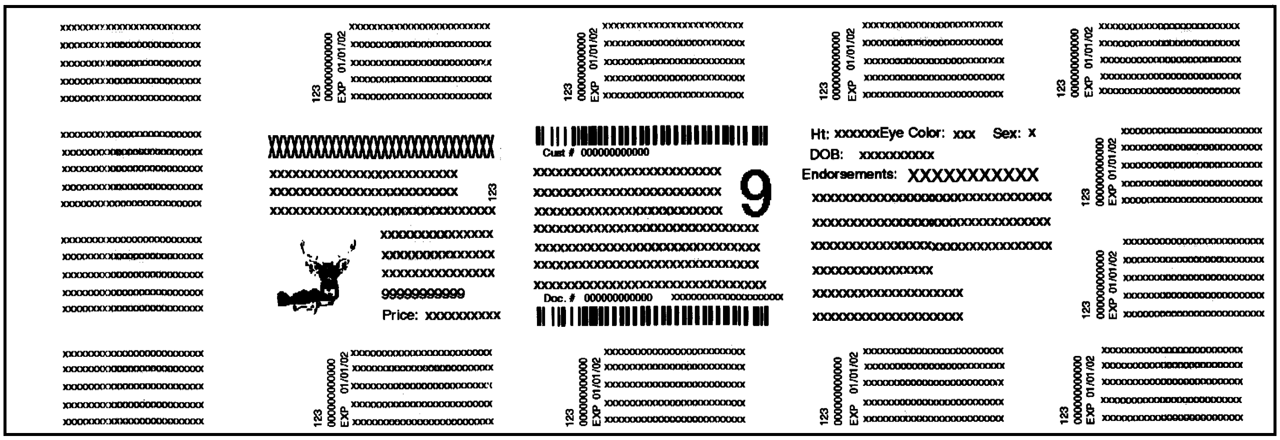
This tests the alignment of the license content on the license media. If the content is misaligned the license is invalid.

Use this test to minimize the chances of printing a misaligned license.

Run an alignment test:

- At the beginning of each business day, before you make your first license transaction
- After replacing license media or printer ribbon in the license printer
- After a power interruption and you have to power up your terminal

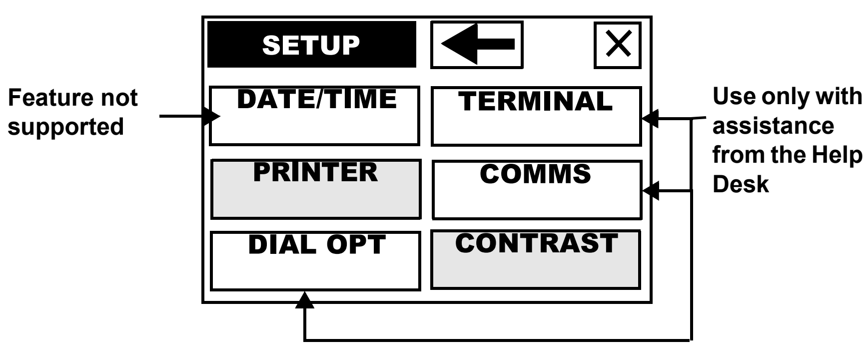
This is the way an alignment test prints:



Setup

Setup includes to two settings you can access under this selection:

Option	Description
Printer	• On/Off (always keep printer in "On" mode) • Paper feed - feeds receipt paper one line at a time • Receipt text - feature not supported
Contrast	Set the contrast of the display to backlighting



Function

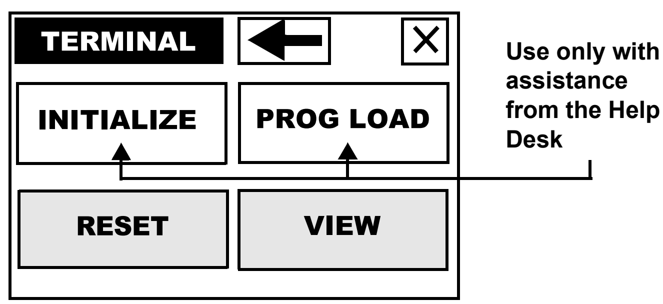
Function includes specialized software functions that should only be used with assistance from the WorldCom help desk.

Improper use can leave your terminal inoperable.

Terminal

Terminal includes two settings you can access under this selection.

Option	Description
Reset	Resets the terminal, having the same effect as turning off the power but without cutting power to the other terminal components
View	Enables you to view the version of the software that you are using



Practise Exercise

In this exercise you will:

- Print an alignment test
- Change the Cut Receipt setting
- Disable access to the End Shift report on the second MAIN menu

Access the Terminal Configuration Option

1. Log on using the Supervisor user ID and password.
2. Bypass training mode.
3. Touch **MANAGEMENT** on the MAIN menu.
4. Touch **CONFIGURE TERMINAL** on the MANAGEMENT menu.

Access the License Test Option

1. Touch **TESTS** on the CONFIGURE menu.
2. Touch **LICENSE** on the TESTS menu.

   The alignment test license prints and the application returns to the MAIN menu.

Access Edit Parameters for the Cut Receipt and Enable End Shift Settings

1. Touch **MANAGEMENT** on the MAIN menu.
2. Touch **CONFIGURE TERMINAL** on the MANAGEMENT menu.
3. Touch **EDIT PARAMETERS** on the CONFIGURE menu.
4. Touch or press **ENTER** until you come to the Cut Receipt screen.
5. Touch **CLEAR** or press **DEL[ETE]** to clear the current setting.
6. Type n.

7. Touch or press **ENTER** to submit the change.

The Enable End Shift screen appears.

8. Touch **CLEAR** or press **DEL[ETE]** to clear the current setting.

9. Type n.

10. Touch or press **ENTER** to submit the change.

11. Touch the **EXIT** icon on the State Tax Percentage screen to return to the MAIN menu.

Reset the Cut Receipt Setting

Go through these steps once more to:

- Change the Cut Receipt setting back to its original setting
- Change the Enable Shift report setting back to its original setting

Stop Here

Terminal

Lesson 16

Processing Mail

Lesson Objectives

When you finish this lesson you should be able to:

- View, retrieve, and send electronic messages

Lesson Overview

The electronic mail feature under Management gives users with Supervisor or Agent Location Manager roles expanded mail processing options.

In this lesson we will show you how to access and use these features.

Processing Electronic Mail Messages

These are the three mail options:

Option	Function
View	Displays the message stored on the terminal. Only one message is stored. A new message deletes the old message.
Receive	Connects to the TLC system to request a new message. If a new message is available it is displayed and can be stored and/or printed. If no new message is available the application returns to the MAIN menu.
Send	An electronic message of 40 characters can be sent to TPW.

To Demonstrate - Electronic Mail Options

This demonstration shows how to access the Process Mail feature to view, receive, and send electronic messages.

Access the Process Mail Feature

Step 1

Log on (if necessary).

Step 2

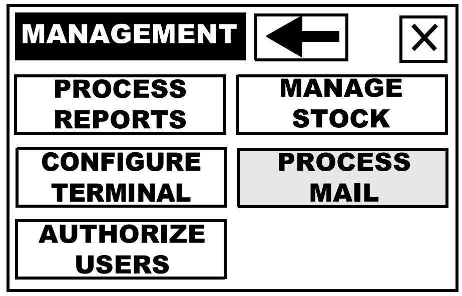
Bypass training mode.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

Step 4

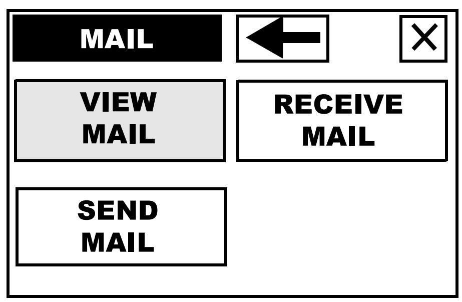
Touch **PROCESS MAIL** on the MANAGEMENT menu.



View Mail

Step 1

Touch **VIEW MAIL** on the MAIL menu.



STEP 2

Options:

- Touch **SCROLL** to view the entire message online
  Long messages will require you to touch **SCROLL** more than once.
- Touch **PRINT** to print the message from the dealer receipt printer

Touch **PRINT**.

The message prints from the dealer receipt printer. The application returns to the MAIN menu.

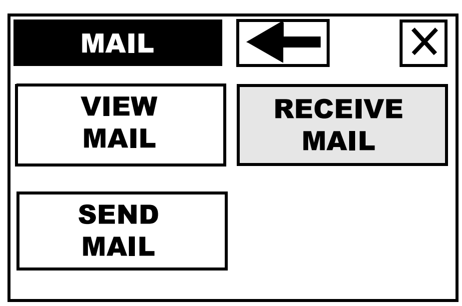
Receive Mail

Step 1

Access **PROCESS MAIL** from MANAGEMENT on the MAIN menu.

Step 2

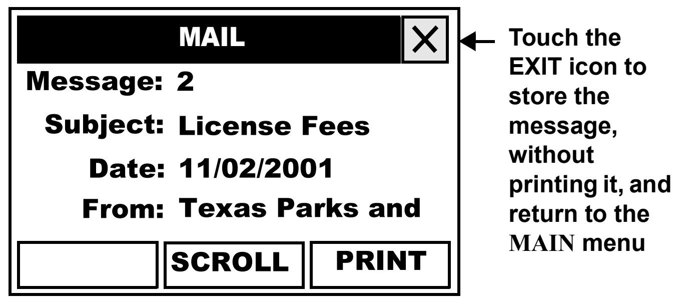
Touch **RECEIVE MAIL** on the MAIL menu.



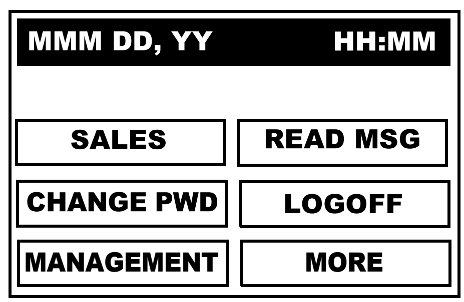
Step 3

Option:

- If a message is available and ready to be sent to the terminal it appears on the display.



- If a message is not available the application returns to the MAIN menu.



Step 4

View the message then bypass printing by touching the **EXIT** icon to return to the MAIN menu.

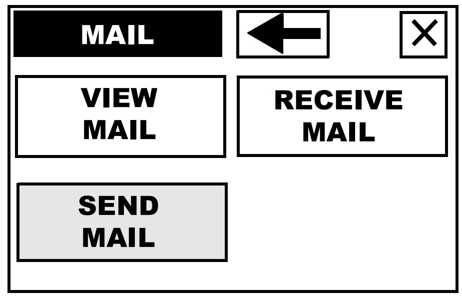
Send Mail

Step 1

Access **PROCESS MAIL** from MANAGEMENT on the MAIN menu.

Step 2

Touch **SEND MAIL** on the MAIL menu.



Step 3

Type your message to TPW.

The maximum message length is 40 characters, including spaces and punctuation.

When you are finished touch or press **ENTER**.

Your message is sent. The application returns to the MAIN menu.

Sending and Receiving Electronic Messages

This electronic messaging feature is limited to the TLC system.

When you send a message it goes directly to TPW. An agent cannot send a message to other agents.

Messages sent from TPW can be sent to:

- All agents and all point of sale terminals; or
- Specific agents, such as agents within a geographic area; or
- A single agent (location); or
- A single point of sale terminal

Practice Exercise

In this exercise you will:

- View a mail message
- Request a mail message
- Send a mail message

Access the Mail Menu

1. Logon using the Supervisor user ID and password.
2. Bypass training mode.
3. Touch **MANAGEMENT** on the MAIN menu
4. Touch **PROCESS MAIL** on the MANAGEMENT menu.

View a Mail Message

1. Touch **VIEW MAIL** on the MAIL menu.
2. Touch **SCROLL** to view the entire message.
3. Touch **PRINT** to print the message.

   The MAIN menu appears.

Receive Mail

1. Follow steps 1-4 above to access the MAIL menu.
2. Touch **RECEIVE MAIL**.
3. Touch **SCROLL** to view the entire message.
4. Touch **PRINT** to print the message.

   The MAIN menu appears.

Send Mail

1. Follow steps 1-4 above to access the MAIL menu.
2. Touch **SEND MAIL**.
3. Type a short message (maximum of 40 characters).
4. Touch or press **ENTER**.

   The MAIN menu appears.

Stop Here

Lesson 17

Ordering Terminal Stock

Lesson Objectives

When you finish this lesson you should be able to:

- Order supplies and stock used for the point of sale terminal

Lesson Overview

You can order licensing stock such as license media and printer ribbon for the license printer and receipt paper for the dealer receipt printer using your point of sale terminal.

In this lesson we will explain how to order your stock and acknowledge receipt of those supplies.

Ordering Stock

To Demonstrate - Ordering Supplies On-Line

This demonstration shows how to select and order stock.

Access the Manage Stock Menu

Step 1

Log on (if necessary).

Step 2

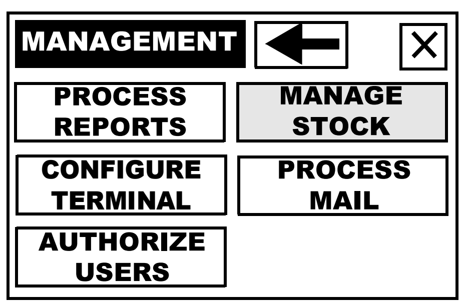
Bypass training mode.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

Step 4

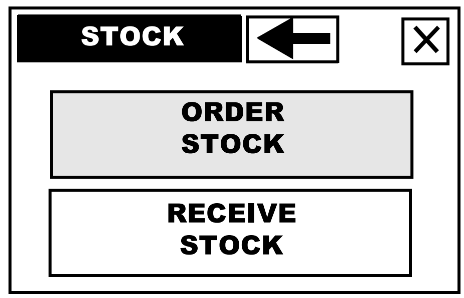
Touch **MANAGE STOCK** on the MANAGEMENT menu.



Order Supplies

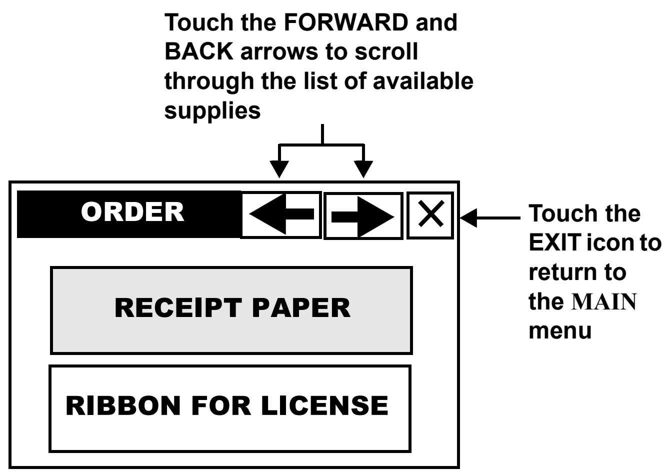
Step 1

Touch **ORDER STOCK** on the STOCK menu.



Step 2

Touch the supplies you need.



Stock Available for Ordering

You can order the following stock using your point of sale terminal:

- Receipt paper (for the dealer receipt printer)
- Ribbon for license (for the license printer)
- License paper (license media)
- Large kit (6 rolls) - stock of all supplies
- Small kit (2 rolls) - stock of all supplies

Receiving Stock

This demonstration shows how to acknowledge receipt of ordered supplies.

Access the Manage Stock Menu

Step 1

Log on (if necessary).

Step 2

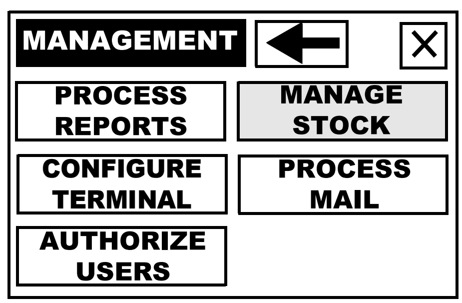
Bypass training mode.

Step 3

Touch **MANAGEMENT** on the MAIN menu.

Step 4

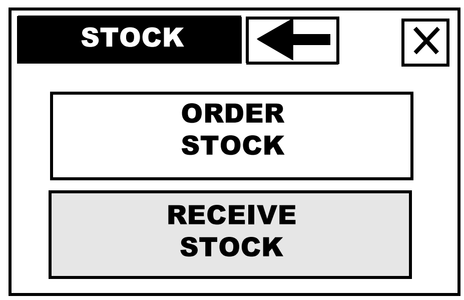
Touch **MANAGE STOCK** on the MANAGEMENT menu.



Acknowledge Receipt

Step 1

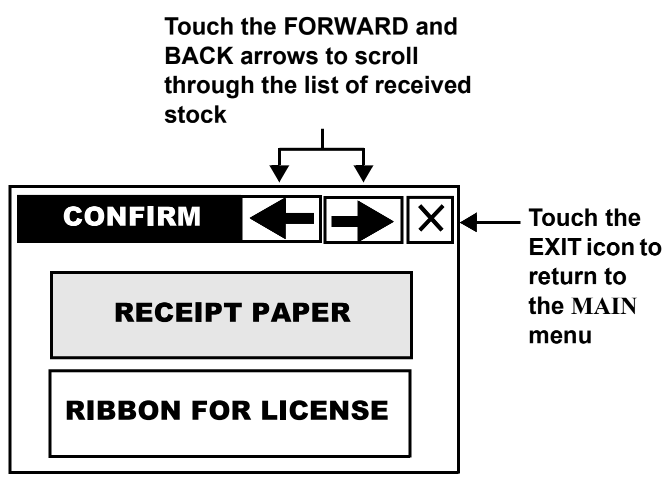
Touch **RECEIVE STOCK** on the STOCK menu.



The list of shipped items appears.

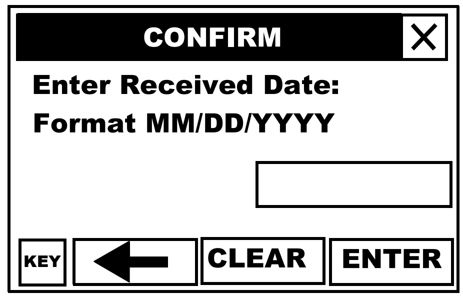
Step 2

Touch the item received.



Step 3

Enter the date the stock was received.



Touch or press **ENTER** to return to the CONFIRM screen.

Continue acknowledging receipt of supplies.

Step 4

When finished touch or press **ENTER** to send your confirmation to the TLC system.

Lesson 18

Activating Your Terminal

Lesson Objectives

When you finish this lesson you should be able to:

- Connect your point of sale terminal to the TLC system to activate the terminal

Lesson Overview

You need to establish your connection to the TLC system before authorizing users, selling licenses, or performing administrative tasks.

In this lesson we will show you the steps to follow to set up your connection.

Entering Your Information

When you receive your point of sale terminal you will also receive important information on setting up your connection to the TLC system. You will receive assistance over the phone to complete this first task.

This information is provided to the individual at your location previously designated as the Agent Location Manager.

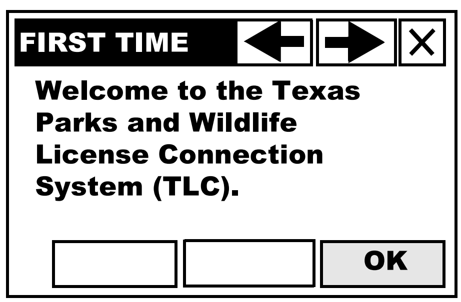
When you power up your terminal the first time the screens that appear below will be displayed.

This is only time these screens will appear.

Start-Up Screens

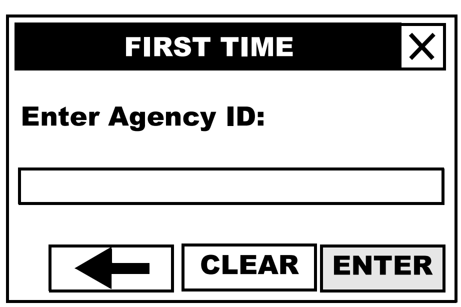
Welcome Screen

Touch **OK** or press **ENTER**.



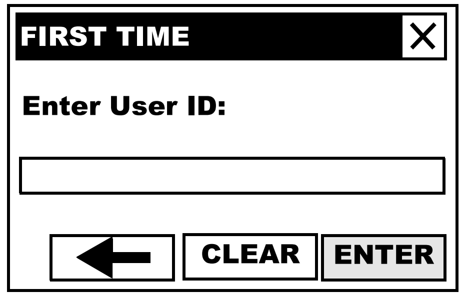
Step 1

Type the Agency ID provided and touch or press **ENTER**.



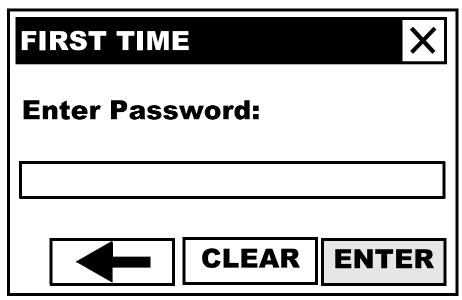
Step 2

Type the user ID provided and touch or press **ENTER**.



Step 3

Type the password provided and touch or press **ENTER**.



Verifying Your Location ID and Log On

After entering your user password the terminal dials the TLC system to confirm your Agency ID and log on information.

The system logs on the Agent Location Manager and displays the MAIN menu.

You are now ready to authorize users for the terminal, sell licenses and perform administrative tasks.

Lesson 19

Practice Exercises

Lesson Objectives

When you finish this lesson you will have practiced using the application to perform a variety of tasks related to issuing, voiding and replacing licenses.

Lesson Overview

This lesson provides a framework for practicing the skills learned from this manual and the training video to perform licensing tasks using your point of sale terminal.

Examples of different licensing scenarios are presented to guide you in handling a variety of situations. This way you will be familiar with the operation of the terminal before actually issuing licenses to the public.

Use the training mode - its been designed specifically to help you gain proficiency in the use of the terminal and application so you can serve your customers quickly and efficiently.

Before You Begin

Keep in mind the following before you begin.

You Need to be Authorized

You need to be authorized to use the point of sale terminal.

This means you must already have a user ID and password to log on and have been assigned the Clerk role to practice these exercises.

If you are assigned the Supervisor or Agent Location Manager role you can also use the training mode to practice management tasks as well.

If You are the Agent Location Manager

If you are the Agent Location Manager you already have a user ID and password.

However, you need to create a new user for yourself and, at the minimum, assign to that user the Clerk role. It would be a good idea to also assign the Supervisor role as well so you need only one logon to practice licensing and management tasks.

Use the Training Mode

You *must* be in training mode when you practice using the application otherwise you will be adding live data to the TLC database.

What Can I Do In Training Mode?

All features and functions available in the "live’ application are also available in training mode. The only difference is your information will not be saved over an extended period of time.

Also, training mode enforces the same limitations imposed by the "live" application based on your role assignment.

For example, if you are assigned the Clerk role you will not be able to access any features or functions located under the Management selection on the MAIN menu.

In Training Mode Data is Not Retained

Periodically all data in the training database is deleted. Data is not allowed to accumulate.

Do not be surprised if the customer you added to the training database yesterday is gone today. It is to be expected and indicates the database is working as it should rather than an indication of a problem or defect.

How Will You Know You Are In Training Mode?

In the Hypercom display the screen title above the MAIN menu displays "TRAINING MODE."

"TRAINING" also appears on any licenses you print.

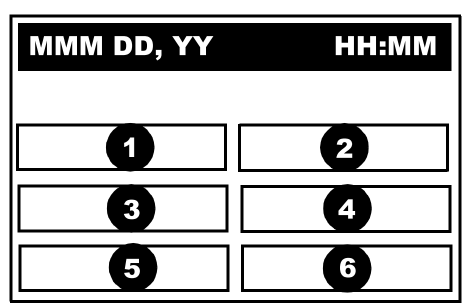
Log Off When You Finish

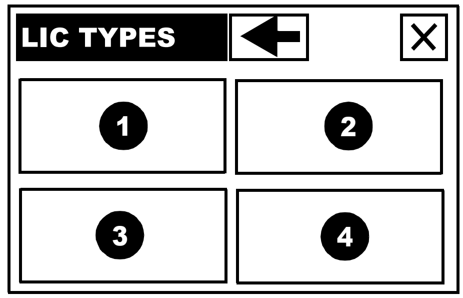
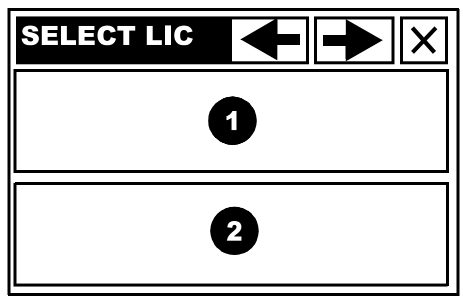
Make it a habit to log off when you finish practicing using the application. This makes the application immediately available for others to use.

Using the Hot Keys

Practice using the number keys on your keyboard to make selections rather than touching the terminal screen.

Make menu selections using the following keys:

To select an item in a...	Press...
Six-item screen	

To select an item in a...	Press...
Four-item screen	
Two-item screen	

Practice Scenarios - Licensing Transactions

This group of suggested practices includes licensing transactions and related activities.

Your experience in selling licenses can guide you in setting up and practicing other scenarios as well.

The order of the scenarios is different from a typical licensing transaction. Normally you would either retrieve or add your customer to the TLC database then issue a license.

These scenarios begin by adding customers and issuing licenses because you need to:

- Have the customers in the database before you can retrieve them
- Issue a license to a customer to submit that customer to the database

Adding Customers - Customer Profiles

Use this table to create customer profiles. Make a copy of the blank table so you can use it for more than one customer. Remember that data is periodically deleted from the training database. You can refer to your written profiles to quickly re-enter customer information.

> **Note: After creating your customer profile be sure to issue a license so your customer is submitted to the training database and can be retrieved.**

Screen	Customer Profile Data
First name	
Middle name	
Last name	
Suffix	
Gender	
Height (Ft.)	
Height (In.)	
Eye color (see codes)	
Hair color (see codes)	
Date of birth	
Social security number	
Country USA?	
Country	
Driver license state	
Driver license number	
Texas resident	
Street address	
Street address (L2)	

Screen	Customer Profile Data
City	
State	
Zip code	
Zip code+4	
Phone number	
Mailing address same?	
Mailing address	
Mailing address (L2)	
Mailing city	
Mailing country USA?	
Mailing country	
Mailing state	
Mailing zip code	
Mailing zip code+4	

Eye and Hair Color Codes

Use these three-character codes for eye and hair color.

Eye Color	
Black	BLK
Blue	BLU
Brown	BRO
Gray	GRY
Green	GRN
Hazel	HAZ
Maroon	MAR
Multi	MUL
Pink	PNK
Unknown	XXX

Hair Color	
Black	BLK
Blonde	BLN
Brown	BRO
Gray	GRY
Red	RED
Sandy	SDY
White	WHI
Unknown	XXX

Non-USA Resident Screens

Use the following screens for a non-USA resident. They appear automatically if your response to "Country USA?" is no or your response to "Mailing country USA?" is no.

Screen	Customer Profile Data
Country USA?	N
Country	
State/Province	
Postal Code	
Mailing country USA?	N
Mailing country	
Mailing State/Province	
Mailing postal code	
Mailing state	
Mailing zip code	
Mailing zip code+4	

Suggested Customer Profiles

Customer holdings and profiles affect license availability and fees.

These are some suggested customer profiles you can create.

Create several customers with the same profile (customers 1 -3) to make it easier to see how license selection affects availability.

Customer	Profile
Customer 1	• Between the ages of 18 and 64 • Texas resident
Customer 2	• Between the ages of 18 and 64 • Texas resident
Customer 3	• Between the ages of 18 and 64 • Texas resident
Customer 4	• Create yourself as a customer by swiping your Texas driver license
Customer 5	• Over the age of 65 • Texas resident
Customer 6	• Under the age of 17 • Texas resident
Customer 7	• Between the ages of 18 and 64 • Non-Texas resident
Customer 8	• Between the ages of 18 and 64 • Non-USA resident

Correcting Input Errors

Correcting errors when entering customer information when it involves required fields needs to be explained so you are aware of the process.

Scenario

Select **NEW CUST** to add a new customer to the database.

Type a first name in the first name field and touch/press **ENTER**.

Type a last name in the next screen and touch/press **ENTER**.

You will see that you have entered the customer's last name into the middle name field.

If you try to exit the last name field to correct your error the application freezes. This is because the last name is required. The application will not allow you to continue or return to a previous screen without first entering data.

To correct your error enter the customer's last name in the Last Name field and touch/press **ENTER**. Touch the **BACK** arrow twice, first in the Suffix screen, then the Last Name screen, to return to the Middle Name screen. Delete the customer's last name.

Touch/Press **ENTER** to proceed to the Last Name screen. Touch/Press **ENTER** again to continue to the next screen.

You can now complete the data entry process.

Try this process to become familiar with it.

Issuing Licenses

License selection:

- Affects the availability of other licenses
- May trigger a HIP survey for certification or request for ancillary data

Try these scenarios to see how license selection affects the availability of other licenses.

Scenario 1

1. Create Customer 1 and select the resident fishing license. Use the bar code scanner to select the license from the Quick Reference Card or select from the LIC TYPES menu.
2. Now try to select a combo license. Notice that combo licenses are unavailable.
3. Issue the license(s).

Scenario 2

1. Create Customer 2 and select the resident hunting license. Use either the bar code scanner or select from the LIC TYPES menu.
2. Complete the HIP survey.
3. Now select a hunting lease (under Access Others).
4. Complete the ancillary data questions.
5. Issue the license(s).

Scenario 3

1. Create Customer 4 (yourself) by swiping your Texas driver license.
2. Select the Super Combo Package. Use either the bar code scanner or select from the LIC TYPES menu.
3. Now select the fishing and hunting license categories and notice that some of the license selections are not available.
4. Complete the HIP survey.
5. Now select a Gold or Silver Conservation Passport. Use either the bar code scanner or select from the LIC TYPES menu.
6. Complete the ancillary data questions.
7. Issue the license(s).

Scenario 4

1. Create Customer 5 and select either the fishing or hunting license category and notice how the menu selections have changed, as well as the fees.
2. Select a license from one of the categories and issue it.

Scenario 5

1. Create Customer 6 and select either the hunting or fishing license categories and notice how the selections and fees have changed.
2. Select a license from one of the categories and issue it.

Retrieving a Customer

You have added several customers to the training database and issued licenses.

Now you can practice retrieving these customers.

These scenarios will also include additional license selections and some procedural steps.

Scenario 1

1. Retrieve Customer 1 by scanning either the Cust # or Doc # on the license.
2. Select the Fishing Licenses category and notice that Resident Fishing is not available.
3. Select an additional fishing license.
4. Select the resident hunting license.
5. Decline to complete the HIP survey.
6. From the Review screen select Detail and remove the fishing license purchased.
7. Issue the license(s).

Scenario 2

1. Retrieve yourself by swiping your Texas driver license
2. Select a license.
3. From the Review screen go back to the LIC TYPES menu and select another license.
4. Issue the license(s).

Scenario 3

1. Retrieve a customer using one of the ID options (refer to the information you entered on one of the customer data tables).
   - Driver license number
   - Name and date of birth
   - Name and phone number
   - Social security number and date of birth
   - TLC ID # (Cust #)
   - Doc #

2. Select a new license.
3. Issue the license(s).

Cancelling a Transaction

You should know how to cancel a transaction if the customer decides not to continue with a purchase or if you need to back out of a transaction and start over.

Scenario

1. Retrieve any one of the customers previously used for issuing licenses.
2. Select several licenses then cancel the transaction. Keep touching the **EXIT** icon or pressing the **ESC[APE]** key until you return to the SALES menu.
3. On the **SALES** menu touch **MORE**, then touch **CANCEL**.
4. Confirm that you want to cancel the transaction.

Voiding a License

Practice voiding a license.

Scenario 1

1. Remember to select Void and scan or key in the license number of the license you want to void.
2. Select the resident hunting license issued to Customer 1 under "Retrieving a Customer.".
3. Acknowledge prompt to collect license.
4. Complete transaction.

Replacing a License

Practice replacing a license previously issued.

Scenario 1

1. Replace the hunting license issued to Customer 2 under "Issuing Licenses."
2. Respond to the prompts to indicate which tags might have been used and which not used.
3. Acknowledge the prompt for Replacement Form 341.
4. Issue license(s).

Scenario 2

1. Retrieve Customer 5.
2. Select several licenses and issue them.
3. Retrieve Customer 5 again.
4. Replace all of the licenses the customer currently holds.
5. Acknowledge the prompt for Replacement Form 341.
6. Issue license(s)
7. From the SALES menu select **ISSUE** to issue the customer one or more licenses.
8. Select the license.
9. Issue the license(s).

Other Licensing Activities

View Customer Holdings

Retrieve Customer 5 and view the customer's holdings. They should include all issued and replaced licenses.

Overrides

Retrieve Customer 5, select the Override feature and issue a license that the customer already holds.